

National Company of Food Supply

Brazilian Crop Assessment

Grain

CROP 2012/2013
Eleventh Assessment
August/2013



Conab

Ministry of Agriculture, Livestock and Supply

National Supply Company – CONAB

Logistics and Business Management Department – DIGEM

Agribusiness Information Superintendence – SUINF

Technicians in charge:

SÍLVIO ISOPO PORTO

AROLDI ANTÔNIO DE OLIVEIRA NETO

FRANCISCO OLAVO BATISTA DE SOUSA

Crop Assessment and Evaluation Management – GEASA

BERNARDO NOGUEIRA SCHLEMPER

BRUNNO AUGUSTO CARDOSO COSTA

CLEVERTON TIAGO CARNEIRO DE SANTANA

ELEDON PEREIRA DE OLIVEIRA

JOSÉ CAVALCANTE DE NEGREIROS

JUAREZ BATISTA DE OLIVEIRA

MARIA BEATRIZ ARAÚJO DE ALMEIDA

ROBERTO ALVES DE ANDRADE

Colaborators:

DJALMA FERNANDES DE AQUINO – Cotton

JOÃO FIGUEIREDO RUAS – Bean

NILVA CLARO COSTA – Soybean

THOME LUIZ FREIRE GUTH – Corn

PAULO MORCELI - Rice

PAULO MAGNO RABELO – Wheat

Regional Superintendences:

Amazonas, Bahia, C, Espírito Santo, Goiás, Maranhão, Mato Grosso, Mato Grosso do Sul, Minas Gerais, Pará, Paraíba, Paraná, Pernambuco, Piauí, Rio de Janeiro, Rio Grande do Norte, Rio Grande do Sul, Rondônia, Santa Catarina, São Paulo e Tocantins.

Graphics and Art:

THAÍS LORENZINI

Catalographic Card: ADELINA MARIA RODRIGUES – CRB 1/1739

631.165

A185 Brazilian Crop Assessment: grains:

Eleventh Assessment, August 2013

/ National Supply Company. - Brasília:

Conab, 2013.

Brazilian Harvest Monitoring

Grain

CROP 2012/2013
Eleventh Assessment
August/2013

INDEX

1. INTRODUCTION.....	5
2. PLANTED AREA ESTIMATE.....	5
3. YIELD ESTIMATE.....	6
4. CROP ANALYSIS.....	8
COTTON.....	8
PEANUTS.....	11
RICE	12
EDIBLE BEANS	14
SUNFLOWER	20
CASTOR BEANS	21
CORN.....	21
SOYBEANS	24
SORGHUM.....	26
WINTER CROPS.....	26
WHEAT.....	27
TRITICALE.....	29
5. BALANCE OF SUPPLY AND DEMAND.....	30

1. INTRODUCTION

The Ministry of Agriculture, Livestock, and Supply-MAPA systematically carries out assessments of the agriculture crops, through the National Food Supply Company – Conab, to quantify and follow up the Brazilian yield. To undertake this assessment, institutions directly or indirectly connected to agriculture production were contacted in the country's major producing municipalities during the period of July 22-26, 2013, standing out professionals from Cooperatives, State Secretariats of Agriculture, Technical Assistance and Rural Extension agencies (both public and private), finance agents, input resellers, and farmers.

The assessment and its information are the outcome of joint efforts from this Company and the Brazilian Institute of Geography and Statistics (IBGE), agency of the Ministry of Planning, Budget, and Management, in a close collaboration aiming at consolidating official crop estimates for the major Brazilian crops, including in their organization and dissemination.

In this process, both institutions have added their efforts and resources aiming at ensuring the most accurate and reliable information on crop follow up in the Brazilian State outreach, progressively coordinating methods, source, assessment period, disclosure dates and time. To this end, they count on the priceless and ongoing contribution from Federal, State, and Municipal public agencies and all other institutions that generate information in agriculture.

We acknowledge the indispensable participation and collaboration of professionals from the Brazilian Institute of Geography and Statistics (IBGE) and of the aforementioned institutions and all technicians from Conab who directly or indirectly participated in this work.

2. PLANTED AREA ESTIMATE (53.26 million hectares)

The planted area in this season, estimated in 53.26 million hectares, is 4.7% (2.38 million hectares) larger than planted area in the 2011/12 season, which amounted to 50.89 million hectares (Table1).

The highlights are for soybean crop, presenting an increase of 10.7% (2.68 million hectares), from 25.04 million hectares to 27.72 million hectares, and corn second crop with increase of 17.6% (1.34 million hectares), from 7.62 million hectares to 8.96 million hectares. There was a reduction of 8.7% (665.8 thousand hectares) in corn first crop farming with 6.90 million hectares sowed. Planted area with corn first and second crops adds up to 15.86 million hectares, that is, increase of 4.5% or 688.3 thousand hectares. Area increase is also noticed in peanuts first crop (5.0%), peanuts second crop (24.6%), and sorghum (0.3%).

All other crops present reductions in planted area, markedly, total edible beans and corn first crop. Corn accounts for a decrease of 8.7% (655.8 thousand hectares), and edible beans (total), reduction of 5.2% (168.4 thousand hectares), with greater loss in the first crop farming with less 9.2% (114.5 thousand hectares).

Table 1
BRAZIL
PLANTED AREA ESTIMATE
2011/2012 AND 2012/2013 CROPS

(In 1000 ha)

PRODUCTS	HARVEST			VARIATION	
	11/12 (a)	12/13		Percentage	Absolute
		May/2013 (b)	Jun/2013 (c)	(c/a)	(c-a)
COTTON	1.393,4	895,0	894,1	(35,8)	(499,3)
TOTAL PEANUT	93,9	102,3	100,9	7,5	7,0
PEANUT 1ST CROP	82,1	86,2	86,2	5,0	4,1
PEANUT 2ND CROP	11,8	16,1	14,7	24,6	2,9
RICE	2.426,7	2.390,3	2.390,3	(1,5)	(36,4)
TOTAL BEANS	3.262,1	3.061,2	3.093,7	(5,2)	(168,4)
BEANS 1ST CROP	1.241,4	1.122,9	1.127,2	(9,2)	(114,2)
BEANS 2ND CROP	1.394,6	1.292,9	1.304,3	(6,5)	(90,3)
BEANS 3RD CROP	626,1	645,4	662,2	5,8	36,2
SUNFLOWER	74,5	69,1	62,6	(16,0)	(11,9)
CASTOR BEAN	128,2	87,8	87,8	(31,5)	(40,4)
TOTAL CORN	15.178,1	15.843,7	15.866,4	4,5	688,3
CORN 1ST CROP	7.558,5	6.892,6	6.902,7	(8,7)	(655,8)
CORN 2ND CROP	7.619,6	8.951,1	8.963,7	17,6	1.344,1
SOYBEAN	25.042,2	27.721,5	27.721,5	10,7	2.679,3
SORGHUM	786,9	797,1	788,9	0,3	2,0
SUBTOTAL	48.386,0	50.968,0	51.006,2	5,4	2.620,3
OAT	153,0	168,7	168,7	10,3	15,7
CANOLA	42,4	43,8	43,8	3,3	1,4
RYE	2,3	2,3	2,3	-	-
BARLEY	88,4	102,8	102,8	16,3	14,4
WHEAT	2.166,2	1.895,4	1.895,4	(12,5)	(270,8)
TRITICALE	46,9	48,0	48,0	2,3	1,1
SUBTOTAL	2.499,2	2.261,0	2.261,0	(9,5)	(238,2)
BRAZIL	50.885,2	53.229,0	53.267,2	4,7	2.382,1

SOURCE: CONAB - Suvey: Aug/2013

3. YIELD ESTIMATE (186.15 million tons)

The estimated yield for the 2012/13 season of 186.15 million tons is 12.0% higher than in 2011/12, when it reached 166.20 million tons (Table 2). This result represents an accrual of 19.95 million tons due, mostly, to soybeans farming, presenting yield increase of 22.7% (15.07 million tons) and corn second crop with increase of 15.4% or 6.03 million tons compared to previous crop yield.

Table 2
BRAZIL
GRAIN PRODUCTION ESTIMATE
2011/2012 AND 2012/2013 CROPS

(In 1000 t)

PRODUCTS	HARVEST			VARIATION	
	11/12 (a)	12/13		Percentage	Absolute
		May/2013 (b)	Jun/2013 (c)	(c/a)	(c-a)
SEED COTTON ⁽¹⁾	3.044,6	1.999,3	2.016,5	(33,8)	(1.028,1)
FIBER COTTON	1.893,3	1.262,0	1.275,1	(32,7)	(618,2)
TOTAL PEANUT	294,7	336,0	330,0	12,0	35,3
PEANUT 1ST CROP	274,6	306,1	306,1	11,5	31,5
PEANUT 2ND CROP	20,1	29,9	23,9	18,9	3,8
RICE	11.599,5	11.858,3	11.858,3	2,2	258,8
TOTAL BEANS	2.918,5	2.828,4	2.827,6	(3,1)	(90,9)
BEANS 1ST CROP	1.235,6	957,1	964,6	(21,9)	(271,0)
BEANS 2ND CROP	1.063,9	1.158,5	1.129,9	6,2	66,0
BEANS 3RD CROP	619,0	712,8	733,1	18,4	114,1
SUNFLOWER	116,4	110,0	104,1	(10,6)	(12,3)
CASTOR BEAN	24,9	15,4	15,3	(38,6)	(9,6)
TOTAL CORN	72.979,8	79.077,8	80.253,3	10,0	7.273,5
CORN 1ST CROP	33.867,1	34.835,0	35.111,9	3,7	1.244,8
CORN 2ND CROP	39.112,7	44.242,8	45.141,4	15,4	6.028,7
SOYBEAN	66.383,0	81.456,7	81.456,7	22,7	15.073,7
SORGHUM	2.221,9	2.160,0	2.078,1	(6,5)	(143,8)
SUBTOTAL	159.583,3	179.841,9	180.939,9	13,4	21.356,6
OAT	353,5	360,7	360,7	2,0	7,2
CANOL	52,0	60,5	60,5	16,3	8,5
RYE	3,5	3,7	3,7	5,7	0,2
BARLEY	305,1	287,2	287,2	(5,9)	(17,9)
WHEAT	5.788,6	4.379,5	4.379,5	(24,3)	(1.409,1)
TRITICALE	112,2	116,9	116,9	4,2	4,7
SUBTOTAL	6.614,9	5.208,5	5.208,5	(21,3)	(1.406,4)
BRAZIL ⁽²⁾	166.198,2	185.050,4	186.148,4	12,0	19.950,2

SOURCE: CONAB - Suvey: Aug/2013

⁽¹⁾ Production of cotton seed.

⁽²⁾ Exclude the production of cotton fiber.

Table 3
BRAZIL
COMPARISON OF AREA, AVERAGE AND PRODUCTION - SELECTED PRODUCTS(*)
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			AVERAGE - (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %
	(a)	(b)	(b/a)	(c)	(d)	(d/c)	(e)	(f)	(f/e)
NORTH	1.795,9	1.874,8	4,4	2.760	2.936	6,4	4.956,0	5.504,7	11,1
RR	33,0	34,5	4,5	3.982	4.000	0,5	131,4	138,0	5,0
RO	411,1	421,4	2,5	2.662	2.861	7,5	1.094,3	1.205,6	10,2
AC	70,2	71,6	2,0	1.808	1.902	5,2	126,9	136,2	7,3
AM	26,8	21,5	(19,8)	2.026	1.940	(4,2)	54,3	41,7	(23,2)
AP	6,1	6,0	(1,6)	918	967	5,3	5,6	5,8	3,6
PA	507,0	506,0	(0,2)	2.313	2.666	15,3	1.172,7	1.349,0	15,0
TO	741,7	813,8	9,7	3.197	3.230	1,0	2.370,8	2.628,4	10,9
NORTHEAST	7.331,7	7.309,5	(0,3)	1.700	1.650	(2,9)	12.466,7	12.057,8	(3,3)
MA	1.533,6	1.626,7	6,1	1.906	2.300	20,7	2.922,5	3.741,0	28,0
PI	1.173,9	1.264,1	7,7	1.947	1.261	(35,2)	2.286,0	1.594,6	(30,2)
CE	1.014,6	794,3	(21,7)	169	218	29,0	171,9	173,5	0,9
RN	17,3	28,7	65,9	474	509	7,4	8,2	14,6	78,0
PB	79,4	102,7	29,3	98	460	369,4	7,8	47,2	505,1
PE	442,1	315,1	(28,7)	165	301	82,4	73,1	94,8	29,7
AL	69,0	76,5	10,9	813	753	(7,4)	56,1	57,6	2,7
SE	243,0	244,8	0,7	2.510	2.842	13,2	609,9	695,6	14,1
BA	2.758,8	2.856,6	3,5	2.295	1.974	(14,0)	6.331,2	5.638,9	(10,9)
MID-WEST	18.828,9	20.604,5	9,4	3.781	3.710	(1,9)	71.196,7	76.434,7	7,4
MT	10.969,1	12.294,4	12,1	3.681	3.720	1,1	40.373,3	45.730,5	13,3
MS	3.256,3	3.610,7	10,9	3.567	3.617	1,4	11.616,1	13.060,6	12,4
GO	4.483,2	4.564,4	1,8	4.148	3.707	(10,6)	18.597,8	16.920,5	(9,0)
DF	120,3	135,0	12,2	5.067	5.356	5,7	609,5	723,1	18,6
SOUTHEAST	4.878,9	4.951,1	1,5	4.051	4.091	1,0	19.764,7	20.254,2	2,5
MG	2.979,7	3.040,7	2,0	4.098	3.951	(3,6)	12.209,8	12.013,0	(1,6)
ES	50,8	40,6	(20,1)	1.848	1.887	2,1	93,9	76,6	(18,4)
RJ	11,4	10,3	(9,6)	2.096	2.019	(3,7)	23,9	20,8	(13,0)
SP	1.837,0	1.859,5	1,2	4.049	4.380	8,2	7.437,1	8.143,8	9,5
SOUTH	18.049,8	18.527,3	2,6	3.203	3.881	21,2	57.814,1	71.897,0	24,4
PR	9.169,4	9.239,8	0,8	3.430	4.040	17,8	31.447,7	37.332,9	18,7
SC	1.303,2	1.306,1	0,2	4.203	4.819	14,7	5.477,6	6.294,7	14,9
RS	7.577,2	7.981,4	5,3	2.757	3.542	28,5	20.888,8	28.269,4	35,3
NORTH/NORTHEAST	9.127,6	9.184,3	0,6	1.909	1.912	0,2	17.422,7	17.562,5	0,8
CENTER-SOUTH	41.757,6	44.082,9	5,6	3.563	3.824	7,3	148.775,5	168.585,9	13,3
BRAZIL	50.885,2	53.267,2	4,7	3.266	3.495	7,0	166.198,2	186.148,4	12,0

SOURCE: CONAB - Suvey: Aug/2013

(*) Selected Products: cotton seed, peanut (1st and 2nd), rice, oat, rye, barley, bean (1st, 2nd and 3rs), sunflower, castorbean, corn (1st and 2nd), soybean, sorghum, wheat and triticale.

4. CROP ANALYSIS

COTTON

National cotton seeds yield for the 2012/13 season is estimated in 3,291.6 thousand tons, configuring, therefore, a reduction of 33.3% compared to the 2011/12 season. In its turn, cotton fiber yield will achieve 1,275.1 thousand tons, recording a reduction of 32.7%, compared to previous season.

Such reductions are due, mainly, to expressive area reductions in all producing regions in the country caused, mostly, by drop in prices both in the domestic and international markets, high production costs, in addition to corn and soybeans attractive prices, as already mentioned in previous reports.

Harvest pace is intense in the major producing regions and it is estimated, until now, that around 35.0% to 44,0% have been harvested at national level. Droughts have been occurred in Mato Grosso, major national producer, during April and May, which did not affect productivity, recording a slight accrual compared to previous crop. There was productivity increase in Bahia of 13.6% caused, mostly, by favorable weather conditions.

Crop are in good development in Minas Gerais, although some areas suffered with droughts and high temperatures recorded in December and February, markedly in the North and Northwestern portions of the state. It is estimate an average productivity, in that state, of 3.374 kg/ha, 6.3% smaller than in previous crop.

In this assessment, Conab consolidates data for cotton planted area in the country (first and second crops), therefore, cotton farmed area is 894.1 thousand hectares, presenting a reduction of 35.8% compared to previous season when 1,393.4 thousand hectares were sowed.

A reduction in planted area was observed in all producing states in the Center-South and North/Northeast regions, which account for 65.7% and 34.3%, respectively, of farmed area at national level.

There was a slight change in cotton seeds average productivity, compared to previous assessment, and this season shall end with a volume 3.9% higher than in previous crop. The survey points out that, in terms of Brazil, after harvesting, the average productivity shall reach around 3,682 kg/ha of cotton seeds.

Supply and Demand

The yield figure gotten in this eleventh crop assessment amounted to 1,275.1 thousand, slightly higher than the figure disclosed in the previous month. Productivity outcomes throughout harvesting have slightly surpassed expectations.

Exports predictions have maintained equal to the figures of previous survey, that is, 530 thousand tons. In spite of export increase comparatively to past month, embarkation performance remains weak if compared to the same period in the past year. Also, it should be highlighted that part of the flex contracts (which can be both for exports and for the domestic market) in the Brazilian Commodity Exchange– BBM (acronym in Portuguese) has been reverted toward the domestic market.

In the other hand, imports prediction has been changed due to exports reduction and reversal of flex contracts toward the domestic market. With the harvested fiber in the market, expressive imports volume in the coming months is not foreseeable. Additionally, imports parity values do not show to be advantageous buying from the international market. Thus, fiber imports expectation is now of 35 thousand tons, while in July 2013 it was estimated in 51 thousand tons.

Considering the current figure, the new setup of the supply scenario for 2013 is now the following: total supply of produce (initial stock + yield + imports) for the season beginning now is set in 1,810.8 thousand tons, while total demand (domestic consumption + exports) has been evaluated in 1,417 thousand tons.

As final result, there is a prediction for the carryover stock at the end of this season of 393.8 thousand tons of fiber, which is enough to supply the national industry demand for the offseason period plus exports during approximately 3.3 months.

Table 4
COTTON
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %
	(a)	(b)	(b/a)	(c)	(d)	(d/c)	(e)	(f)	(f/e)
NORTH	7,5	6,0	(20,0)	2.900	3.150,0	8,6	21,8	18,9	(13,3)
TO	7,5	6,0	(20,0)	2.900	3.150,0	8,6	21,8	18,9	(13,3)
NORTHEAST	460,4	300,8	(34,7)	3.016	3.409,0	13,0	1.388,8	1.025,4	(26,2)
MA	18,6	16,7	(10,0)	3.975	4.090,0	2,9	73,9	68,3	(7,6)
PI	21,3	11,4	(46,6)	3.480	3.570,0	2,6	74,1	40,7	(45,1)
CE	1,3	0,9	(33,9)	170	120,0	(29,4)	0,2	0,1	(50,0)
RN	0,5	0,1	(80,0)	520	3.000,0	476,9	0,3	0,3	-
PB	0,2	0,1	(30,0)	106	300,0	183,0	-	-	-
PE	0,8	0,1	(84,0)	195	380,0	94,9	0,2	-	(100,0)
AL	0,2	0,1	(50,0)	300	320,0	6,7	0,1	-	(100,0)
BA	417,5	271,4	(35,0)	2.970	3.375,0	13,6	1.240,0	916,0	(26,1)
MID-WEST	877,3	560,9	(36,1)	3.824	3.845,0	0,5	3.354,5	2.156,8	(35,7)
MT	725,7	475,3	(34,5)	3.840	3.810,0	(0,8)	2.786,7	1.810,9	(35,0)
MS	62,0	39,5	(36,3)	3.695	4.170,0	12,9	229,1	164,7	(28,1)
GO	89,6	46,1	(48,5)	3.780	3.930,0	4,0	338,7	181,2	(46,5)
SOUTHEAST	46,7	26,3	(43,7)	3.651	3.432,0	(6,0)	170,6	90,3	(47,1)
MG	29,6	20,0	(32,4)	3.600	3.374,0	(6,3)	106,6	67,5	(36,7)
SP	17,1	6,3	(63,3)	3.740	3.615,0	(3,3)	64,0	22,8	(64,4)
SOUTH	1,5	0,1	(93,3)	1.439	2.375,0	65,0	2,2	0,2	(90,9)
PR	1,5	0,1	(92,6)	1.439	2.375,0	65,0	2,2	0,2	(90,9)
NORTH/NORTHEAST	467,9	306,8	(34,4)	3.015	3.404,0	12,9	1.410,6	1.044,3	(26,0)
CENTER-SOUTH	925,5	587,3	(36,5)	3.811	3.826,0	0,4	3.527,3	2.247,3	(36,3)
BRAZIL	1.393,4	894,1	(35,8)	3.544	3.682,0	3,9	4.937,9	3.291,6	(33,3)

SOURCE: CONAB - Suvey: Aug/2013

Table 5
COTTON FIBER
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %
	(a)	(b)	(b/a)	(c)	(d)	(d/c)	(e)	(f)	(f/e)
NORTH	7,5	6,0	(20,0)	1.131	1.197,0	5,8	8,5	7,2	(15,3)
TO	7,5	6,0	(20,0)	1.131	1.197,0	5,8	8,5	7,2	(15,3)
NORTHEAST	460,4	300,8	(34,7)	1.176	1.331,0	13,2	541,6	400,2	(26,1)
MA	18,6	16,7	(10,0)	1.550	1.616,0	4,3	28,8	27,0	(6,3)
PI	21,3	11,4	(46,6)	1.357	1.392,0	2,6	28,9	15,9	(45,0)
CE	1,3	0,9	(33,9)	60	42,0	(30,0)	0,1	-	(100,0)
RN	0,5	0,1	(80,0)	182	1.050,0	476,9	0,1	0,1	-
PB	0,2	0,1	(30,0)	37	105,0	183,8	-	-	-
PE	0,8	0,1	(84,0)	68	133,0	95,6	0,1	-	(100,0)
AL	0,2	0,1	(50,0)	105	112,0	6,7	-	-	-
BA	417,5	271,4	(35,0)	1.158	1.316,0	13,6	483,6	357,2	(26,1)
MID-WEST	877,3	560,9	(36,1)	1.454	1.483,0	2,0	1.275,8	832,1	(34,8)
MT	725,7	475,3	(34,5)	1.459	1.467,0	0,5	1.058,9	697,2	(34,2)
MS	62,0	39,5	(36,3)	1.423	1.626,0	14,3	88,2	64,2	(27,2)
GO	89,6	46,1	(48,5)	1.436	1.533,0	6,8	128,7	70,7	(45,1)
SOUTHEAST	46,7	26,3	(43,7)	1.426	1.348,0	(5,5)	66,6	35,5	(46,7)
MG	29,6	20,0	(32,4)	1.411	1.323,0	(6,2)	41,8	26,5	(36,6)
SP	17,1	6,3	(63,3)	1.451	1.428,0	(1,6)	24,8	9,0	(63,7)
SOUTH	1,5	0,1	(93,3)	547	903,0	65,1	0,8	0,1	(87,5)
PR	1,5	0,1	(92,6)	547	903,0	65,1	0,8	0,1	(87,5)
NORTH/NORTHEAST	467,9	306,8	(34,4)	1.176	1.328,0	12,9	550,1	407,4	(25,9)
CENTER-SOUTH	925,5	587,3	(36,5)	1.451	1.477,0	1,8	1.343,2	867,7	(35,4)
BRAZIL	1.393,4	894,1	(35,8)	1.359	1.426,0	4,9	1.893,3	1.275,1	(32,7)

SOURCE: CONAB - Suvey: Aug/2013

Table 6
COTTON SEED
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %
	(a)	(b)	(b/a)	(c)	(d)	(d/c)	(e)	(f)	(f/e)
NORTH	7,5	6,0	(20,0)	1.769	1.953,0	10,4	13,3	11,7	(12,0)
NORTHEAST	460,4	300,8	(34,7)	1.840	2.079,0	13,0	847,2	625,2	(26,2)
MA	18,6	16,7	(10,0)	2.425	2.474,0	2,0	45,1	41,3	(8,4)
PI	21,3	11,4	(46,6)	2.123	2.178,0	2,6	45,2	24,8	(45,1)
CE	1,3	0,9	(33,9)	111	78,0	(29,7)	0,1	0,1	-
RN	0,5	0,1	(80,0)	338	1.950,0	476,9	0,2	0,2	-
PB	0,2	0,1	(30,0)	69	195,0	182,6	-	-	-
PE	0,8	0,1	(84,0)	127	247,0	94,5	0,1	-	(100,0)
AL	0,2	0,1	(50,0)	195	208,0	6,7	0,1	-	(100,0)
BA	417,5	271,4	(35,0)	1.812	2.059,0	13,6	756,4	558,8	(26,1)
MID-WEST	877,3	560,9	(36,1)	2.369	2.362,0	(0,3)	2.078,7	1.324,7	(36,3)
MT	725,7	475,3	(34,5)	2.381	2.343,0	(1,6)	1.727,8	1.113,7	(35,5)
MS	62,0	39,5	(36,3)	2.272	2.544,0	12,0	140,9	100,5	(28,7)
GO	89,6	46,1	(48,5)	2.344	2.397,0	2,3	210,0	110,5	(47,4)
SOUTHEAST	46,7	26,3	(43,7)	2.225	2.084,0	(6,3)	104,0	54,8	(47,3)
MG	29,6	20,0	(32,4)	2.189	2.051,0	(6,3)	64,8	41,0	(36,7)
SP	17,1	6,3	(63,3)	2.289	2.187,0	(4,5)	39,2	13,8	(64,8)
SOUTH	1,5	0,1	(93,3)	892	1.473,0	65,1	1,4	0,1	(92,9)
PR	1,5	0,1	(92,6)	892	1.473,0	65,1	1,4	0,1	(92,9)
NORTH/NORTHEAST	467,9	306,8	(34,4)	1.839	2.076,0	12,9	860,5	636,9	(26,0)
CENTER-SOUTH	925,5	587,3	(36,5)	2.360	2.349,0	(0,5)	2.184,1	1.379,6	(36,8)
BRAZIL	1.393,4	894,1	(35,8)	2.185	2.255,0	3,2	3.044,6	2.016,5	(33,8)

SOURCE: CONAB - Suvey: Aug/2013

PEANUTS

Table 7
PEANUT 1st CROP
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %
	(a)	(b)	(b/a)	(c)	(d)	(d/c)	(e)	(f)	(f/e)
SOUTHEAST	75,6	80,4	6,3	3.475	3.657,0	5,2	262,7	294,1	12,0
MG	2,6	2,8	7,7	3.462	3.269,0	(5,6)	9,0	9,2	2,2
SP	73,0	77,6	6,3	3.475	3.671,0	5,6	253,7	284,9	12,3
SOUTH	6,5	5,8	(10,8)	1.830	2.084,0	13,9	11,9	12,0	0,8
PR	2,8	2,4	(14,6)	2.300	2.850,0	23,9	6,4	6,8	6,3
RS	3,7	3,4	(8,1)	1.475	1.544,0	4,7	5,5	5,2	(5,5)
NORTE/NORDESTE	-	-	-	-	-	-	-	-	-
CENTER-SOUTH	82,1	86,2	5,0	3.344	3.551,0	6,2	274,6	306,1	11,5
BRAZIL	82,1	86,2	5,0	3.344	3.551,0	6,2	274,6	306,1	11,5

SOURCE: CONAB - Suvey: Aug/2013

Table 8
PEANUT 2nd CROP
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %
	(a)	(b)	(b/a)	(c)	(d)	(d/c)	(e)	(f)	(f/e)
NORTH	2,5	1,5	(40,0)	3.741	3.969,0	6,1	9,4	6,0	(36,2)
TO	2,5	1,5	(40,0)	3.741	3.969,0	6,1	9,4	6,0	(36,2)
NORTHEAST	6,1	10,1	65,6	328	952,0	190,2	2,0	9,5	375,0
CE	0,7	1,1	62,6	278	213,0	(23,4)	0,2	0,2	-
PB	0,3	0,4	33,0	649	580,0	(10,6)	0,2	0,2	-
SE	1,3	1,1	(15,4)	1.238	1.300,0	5,0	1,6	1,4	(12,5)
BA	3,8	7,5	97,4	-	1.029,0	-	-	7,7	-
MID-WEST	0,3	0,2	(33,3)	200	1.633,0	716,5	0,1	0,3	200,0
MT	0,3	0,2	(40,0)	200	1.633,0	716,5	0,1	0,3	200,0
SOUTHEAST	2,9	2,9	-	2.957,0	2.800,0	(5,3)	8,6	8,1	(5,8)
SP	2,9	2,9	(1,0)	2.957	2.800,0	(5,3)	8,6	8,1	(5,8)
SOUTH	-	-	-	-	-	-	-	-	-
NORTH/NORTHEAST	8,6	11,6	34,9	1.320	1.342,0	1,7	11,4	15,5	36,0
CENTER-SOUTH	3,2	3,1	(3,1)	2.699	2.725,0	1,0	8,7	8,4	(3,4)
BRAZIL	11,8	14,7	24,6	1.694	1.634,0	(3,5)	20,1	23,9	18,9

SOURCE: CONAB - Suvey: Aug/2013

Table 9
TOTAL PEANUT (1nd and 2nd CROP)
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %
	(a)	(b)	(b/a)	(c)	(d)	(d/c)	(e)	(f)	(f/e)
NORTH	2,5	1,5	(40,0)	3.741	3.969,0	6,1	9,4	6,0	(36,2)
TO	2,5	1,5	(40,0)	3.741	3.969,0	6,1	9,4	6,0	(36,2)
NORTHEAST	6,1	10,1	65,6	328	952,0	190,2	2,0	9,5	375,0
CE	0,7	1,1	57,1	278	213,0	(23,4)	0,2	0,2	-
PB	0,3	0,4	33,3	649	580,0	(10,6)	0,2	0,2	-
SE	1,3	1,1	(15,4)	1.238	1.300,0	5,0	1,6	1,4	(12,5)
BA	3,8	7,5	97,4	-	1.029,0	-	-	7,7	-
MID-WEST	0,3	0,2	(33,3)	200	1.633,0	716,5	0,1	0,3	200,0
MT	0,3	0,2	(33,3)	200	1.633,0	716,5	0,1	0,3	200,0
SOUTHEAST	78,5	83,3	6,1	3.455	3.627,0	5,0	271,3	302,2	11,4
MG	2,6	2,8	7,7	3.462	3.269,0	(5,6)	9,0	9,2	2,2
SP	75,9	80,5	6,1	3.455	3.639,6	5,3	262,3	293,0	11,7
SOUTH	6,5	5,8	(10,8)	1.830	2.084,0	13,9	11,9	12,0	0,8
PR	2,8	2,4	(14,3)	2.300	2.850,0	23,9	6,4	6,8	6,3
RS	3,7	3,4	(8,1)	1.475	1.544,0	4,7	5,5	5,2	(5,5)
NORTH/NORTHEAST	8,6	11,6	34,9	1.320	1.342,0	1,7	11,4	15,5	36,0
CENTER-SOUTH	85,3	89,3	4,7	3.320	3.522,0	6,1	283,3	314,5	11,0
BRAZIL	93,9	100,9	7,5	3.137	3.272,0	4,3	294,7	330,0	12,0

SOURCE: CONAB - Suvey: Aug/2013

RICE

Rice farmed area in the country is confirmed in 2.390.3 thousand hectares in this eleventh assessment and compared to the previous season set in 2,426.7 thousand hectares, it represents a decrease of 1.5%. Except for just few states, there was across the board reduction in rice farming caused by crop low profitability, high risks and lack of incentives that are disarranging the productive chain in many major states because of environmental restriction in planting in sensitive areas and low market prices, among other reasons.

Brazil's largest producing state is Rio Grande do Sul with 1,066.6 thousand hectares, representing 44.5% of the national area, still accounting for 67.0% of the Brazilian yield. The fact that the whole planted area is related to irrigation farming that is responsible

for the state's highest national productivity, in spite of weather problems that contributed to largest portion of sowing occurring out of the schedule technically recommended by rural extension agencies. In Santa Catarina, state that is the second largest national producer, reduction in productivity is estimated in 4.9% compared to past year, also deriving from the fact that major portion of planting occurred out of the recommended "window", which made that the crop in its initial period to undergo intense attack of cold weather, diseases, and shortage in irrigation water.

In the other producing regions of the country, upland rice crop was strongly affected by weather instability. In the Northeast region, even if presenting lesser intensity, it was the second consecutive year of drought, causing serious losses in crop productivity.

Thus, the domestic yield of rice for the 2012/13 season is now estimated in 11,858.3 thousand tons, representing a decrease of 2.2% over the volume harvested in the previous crop.

Supply and Demand

According to the latest data made available by Secex/MDIC, in June 2013, 122.1 thousand tons of rice were imported, while only 0.4 thousand tons were imported from markets outside the Mercosur. Up to date, August 6, Secex/MDIC had not released data related to July 2013, and, therefore, June is the proxy used this analysis. These figures show maintenance of produce flow from the foreign market. In May 2012, these purchases amounted to 114.1 thousand tons, while 0.5 thousand tons came from countries outside the Mercosur. There was a surplus, concerning the consolidated international trade flow for the 2012-13 trading period, of 387 thousand tons, while the exported amount was 1,455.2 thousand tons and imports amounted to 1,068 thousand tons. It is noticed a deficit of 117.7 thousand tons between March and June 2013, the first months of analysis for the 2013-2014 trading period; nevertheless, a reversal in this trade flow is expected for the coming months due to recent devaluation of the Brazilian Real.

According to available information, the final outcome of rice supply scenario for the 2011-2012 and 2012-2013 crops remain unchanged. As consequence of unchanged estimated data, the carryover stock is estimated in 1,340.1 thousand tons, figures to be confirmed in the next assessment of private stocks.

Rice prices in the international market are stable or with slight drops in majority of markets. This phenomenon derives mainly from the interventionist policy in some countries, in which large public stocks of rice were established targeting, thus, in price regulation. There are expectations in the international market that these stocks will be released in the market and, consequently, will place down pressure in rice prices.

Table 10
RICE
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %
	(a)	(b)	(b/a)	(c)	(d)	(d/c)	(e)	(f)	(f/e)
NORTH	318,8	291,9	(8,4)	2.972	3.530,0	18,8	947,3	1.030,3	8,8
RR	19,8	20,0	1,0	5.354	5.452,0	1,8	106,0	109,0	2,8
RO	53,0	48,0	(9,4)	2.679	2.765,0	3,2	142,0	132,7	(6,5)
AC	13,8	13,2	(4,3)	1.377	1.326,0	(3,7)	19,0	17,5	(7,9)
AM	6,5	2,9	(55,0)	2.000	2.015,0	0,8	13,0	5,8	(55,4)
AP	2,4	2,1	(12,5)	1.089	1.112,0	2,1	2,6	2,3	(11,5)
PA	103,4	86,6	(16,2)	2.151	2.278,0	5,9	222,4	197,3	(11,3)
TO	119,9	119,1	(0,7)	3.689	4.750,0	28,8	442,3	565,7	27,9
NORTHEAST	596,7	587,6	(1,5)	1.288	1.462,0	13,5	769,0	858,9	11,7
MA	426,0	416,2	(2,3)	1.098	1.468,0	33,7	467,7	611,0	30,6
PI	117,4	125,1	6,6	1.171	769,0	(34,3)	137,5	96,2	(30,0)
CE	24,2	22,1	(8,7)	2.556	2.367,0	(7,4)	61,9	52,3	(15,5)
RN	0,8	0,7	(12,5)	2.956	2.520,0	(14,7)	2,4	1,8	(25,0)
PB	2,1	0,2	(90,5)	82	107,0	30,5	0,2	-	(100,0)
PE	2,5	2,5	-	5.677	5.677,0	-	14,2	14,2	-
AL	3,0	3,0	-	5.650	5.877,0	4,0	17,0	17,6	3,5
SE	6,9	9,9	43,5	6.500	6.051,0	(6,9)	44,9	59,9	33,4
BA	13,8	7,9	(42,8)	1.680	752,0	(55,2)	23,2	5,9	(74,6)
MID-WEST	218,6	216,5	(1,0)	3.406	3.223,0	(5,4)	744,5	697,7	(6,3)
MT	143,4	166,3	16,0	3.217	3.175,0	(1,3)	461,3	528,0	14,5
MS	17,0	15,2	(10,6)	6.420	6.200,0	(3,4)	109,1	94,2	(13,7)
GO	58,2	35,0	(39,9)	2.992	2.157,0	(27,9)	174,1	75,5	(56,6)
SOUTHEAST	53,7	44,6	(16,9)	2.878	3.106,0	7,9	154,6	138,5	(10,4)
MG	32,2	22,8	(29,2)	1.997	1.956,0	(2,1)	64,3	44,6	(30,6)
ES	1,0	1,0	-	2.692	2.700,0	0,3	2,7	2,7	-
RJ	1,6	1,4	(15,0)	3.346	3.100,0	(7,4)	5,4	4,3	(20,4)
SP	18,9	19,4	2,6	4.350	4.480,0	3,0	82,2	86,9	5,7
SOUTH	1.238,9	1.249,7	0,9	7.252	7.308,0	0,8	8.984,1	9.132,9	1,7
PR	35,8	33,0	(7,8)	4.659	5.291,0	13,6	166,8	174,6	4,7
SC	150,1	150,1	-	7.180	6.828,0	(4,9)	1.077,7	1.024,9	(4,9)
RS	1.053,0	1.066,6	1,3	7.350	7.438,0	1,2	7.739,6	7.933,4	2,5
NORTH/NORTHEAST	915,5	879,5	(3,9)	1.875	2.148,0	14,6	1.716,3	1.889,2	10,1
CENTER-SOUTH	1.511,2	1.510,8	-	6.540	6.599,0	0,9	9.883,2	9.969,1	0,9
BRAZIL	2.426,7	2.390,3	(1,5)	4.780	4.961,0	3,8	11.599,5	11.858,3	2,2

SOURCE: CONAB - Suvey: Aug/2013

EDIBLE BEANS FIRST CROP

Edible beans first crop planted area estimate is consolidated in 1.13 million hectares, setting up a decrease of 9.2% compared to the past crop. All producing states show smaller planting areas than those farmed in previous crop, except for the states of Minas Gerais, the Federal District, Mato Grosso do Sul, Mato Grosso, and Maranhao. The good prospects for other crops, such as soybeans and corn that have greater stability and liquidity, the unstable trade and climate risks associated to edible beans farming inhibited farmers to keep a stable growth for this crop.

Approximately 48% of edible beans first crop yield was harvested in the South Region, with highlights for the state of Parana that harvested 31% of the Brazilian yield. In the Southeast Region, the states of Minas Gerais and Sao Paulo stand out, yielding 15.8% and 12.7%, respectively, of the Brazilian crop. Together, those 3 states account for 59.8%

Commercial farming in the state of Minas Gerais, highlighting the Northwest portion of the state, main producing region, farming is highly technified and presents high productivities. In subsistence farming, the technological level is relatively low with preponderant use of saved seeds and often in consortium with coffee plantations, targeting only the surplus yield for trade. In the state of Minas Gerais *Carioquina* edible beans planting predominates, but farmed areas in the Central region and in *Zona da Mata* area

red and black beans crops are expressive, while in several of the state northern municipalities the planting of string beans stands out.

Edible beans first crop areas across the country have been totally harvested. Indian summer at the beginning of planting, high temperatures between December and February, excessive rainfall in January, in addition to high incidence of the whitefly (*Bemisia tabaci*) in the producing regions caused an expressive drop in productivity leading to quality loss in part of harvested produce, with average productivity 14.0% lower than in the 2011/12 season.

There was yielding gains in the South (7.6%), and losses in the Center-West (26.9%) and Southeast (27.7%) regions

Fall in productivity in the Center-South and North-Northeast Regions was more expressive, reaching around 12%. Three of the four states that produce edible beans first crop in the North-Northeast Region have presented drops. They are: Bahia (22.4%), Tocantins (12.9%), and Piauí (12.9%). There was yielding gains in the South (7.6%), but losses in the Center-West (29.2%) and Southeast (27.7%) regions.

The national edible beans first crop yield shall be consolidated in 964.6 thousand tons, representing reduction of 21.9% compared to the 2011-2012 season.

Table 11
BEANS 1st CROP
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %
	(a)	(b)	(b/a)	(c)	(d)	(d/c)	(e)	(f)	(f/e)
NORTH	6,7	4,3	(35,8)	722	629,0	(12,9)	4,8	2,7	(43,8)
TO	6,7	4,3	(35,8)	722	629,0	(12,9)	4,8	2,7	(43,8)
NORTHEAST	490,2	464,6	(5,2)	224	199,0	(11,2)	109,8	92,5	(15,8)
MA	35,7	40,2	12,6	335	408,0	21,8	12,0	16,4	36,7
PI	214,5	195,0	(9,1)	126	121,0	(4,0)	27,0	23,6	(12,6)
BA	240,0	229,4	(4,4)	295	229,0	(22,4)	70,8	52,5	(25,8)
MID-WEST	82,1	76,2	(7,2)	2.277	1.613,0	(29,2)	187,1	122,8	(34,4)
MT	8,5	12,3	44,2	1.737	1.369,0	(21,2)	14,8	16,8	13,5
MS	1,2	2,2	83,3	2.145	1.470,0	(31,5)	2,6	3,2	23,1
GO	62,2	49,0	(21,2)	2.268	1.809,0	(20,2)	141,1	88,6	(37,2)
DF	10,2	12,7	24,5	2.801	1.120,0	(60,0)	28,6	14,2	(50,3)
SOUTHEAST	290,7	265,1	(8,8)	1.470	1.063,0	(27,7)	427,3	281,7	(34,1)
MG	181,6	186,7	2,8	1.205	818,0	(32,1)	218,8	152,7	(30,2)
ES	6,7	6,5	(3,0)	874	727,0	(16,8)	5,9	4,7	(20,3)
RJ	1,6	1,3	(18,7)	954	940,0	(1,5)	1,5	1,2	(20,0)
SP	100,8	70,6	(30,0)	1.995	1.744,0	(12,6)	201,1	123,1	(38,8)
SOUTH	371,7	317,0	(14,7)	1.363	1.467,0	7,6	506,6	464,9	(8,2)
PR	248,7	210,2	(15,5)	1.401	1.430,0	2,1	348,3	300,6	(13,7)
SC	63,5	55,1	(13,2)	1.464	1.770,0	20,9	93,0	97,5	4,8
RS	59,5	51,7	(13,1)	1.098	1.293,0	17,8	65,3	66,8	2,3
NORTH/NORTHEAST	496,9	468,9	(5,6)	231	203,0	(12,1)	114,6	95,2	(16,9)
CENTER-SOUTH	744,5	658,3	(11,6)	1.506	1.321,0	(12,3)	1.121,0	869,4	(22,4)
BRAZIL	1.241,4	1.127,2	(9,2)	995	856,0	(14,0)	1.235,6	964,6	(21,9)

SOURCE: CONAB - Suvey: Aug/2013

EDIBLE BEANS SECOND CROP

Edible beans second crop planted area is estimated in 1.30 million hectares, which sets up a decrease of 6.5% when compared to past crop. Only seven producing states did not show decrease in planted area. In general, area reduction in this crop is basically located in the North-Northeast region. The state of Ceara accounts practically for 55% of the North-Northeast region area and it had reduction of 21.0% in planted area, consequently reflecting in the overall reduction. Amapa, Maranhao, Rio Grande do Norte, and Paraiba were the only states presenting area increase. The Center-South region shall

increase its area in 2.8%. Approximately, 85% of the edible beans second crop shall be produced in this region.

High market prices and favorable weather conditions in Minas Gerais are not sufficiently attractive to stimulate increases in edible beans second crop farming area. This assessment estimates a downward trend in planted area of 6.6%, which is set in 148.0 thousand hectares. This reduction may be credited to problems related to whitefly control, difficult and costly and favorable weather conditions for planting corn second crop that has presented as a good alternative for land use during the period.

Harvest was completed in this month. It is expected that average productivity across the state will be reduced in 9.2%, estimated in 1,317 kg/ha, attributed to rainfall shortage in April and May, mainly for crops sowed later and that were between the vegetative development and fructification stages. Drop in yield shall be around 15.2%, compared to previous crop, total of 194.9 thousand tons. Much of the more technified areas were not farmed and there are still information related to replacement of colored edible beans planting for *Caupi* edible beans in some areas and, thus, contributing to expected reduction in yields.

In the state of Mato Grosso, a large portion of the yield is of *Caupi* edible beans using a planting system similar to soybean with lower cost. Area is estimated in 162.7 thousand hectares, yielding 217.5 thousand tons, 31.8% higher than previous crop.

In spite of the area decrease in Brazil achieving 15.2%, improvement in expected productivity which should be 13.5% higher than in 2011-2012, allows estimating for total edible beans second crop yield in 1,129.9 thousand tons, an increase of 6.2%.

Table 12
BEANS 2nd CROP
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop (a)	12/13 Crop (b)	VAR. % (b/a)	11/12 Crop (c)	12/13 Crop (d)	VAR. % (d/c)	11/12 Crop (e)	12/13 Crop (f)	VAR. % (f/e)
NORTH	88,6	74,6	(15,8)	733	812,0	10,8	65,0	60,6	(6,8)
RR	3,0	3,0	-	667	660,0	(1,0)	2,0	2,0	-
RO	52,3	39,5	(24,5)	694	812,0	17,0	36,3	32,1	(11,6)
AC	12,6	12,3	(2,4)	600	580,0	(3,3)	7,6	7,1	(6,6)
AM	5,9	5,7	(3,4)	900	897,0	(0,3)	5,3	5,1	(3,8)
AP	1,1	1,6	45,5	840	910,0	8,3	0,9	1,5	66,7
TO	13,7	12,5	(9,0)	939	1.027,0	9,4	12,9	12,8	(0,8)
NORTHEAST	632,7	537,3	(15,1)	117	220,0	88,0	73,9	118,5	60,4
MA	39,0	49,9	27,9	396	501,0	26,5	15,4	25,0	62,3
PI	16,0	4,3	(73,1)	594	603,0	1,5	9,5	2,6	(72,6)
CE	426,0	336,5	(21,0)	76	170,0	123,7	32,4	57,2	76,5
RN	7,2	12,4	72,2	260	304,0	16,9	1,9	3,8	100,0
PB	36,8	52,8	43,6	79	373,0	372,2	2,9	19,7	579,3
PE	107,7	81,4	(24,4)	110	125,0	13,6	11,8	10,2	(13,6)
MID-WEST	193,0	198,7	3,0	1.242	1.398,0	12,6	239,7	277,7	15,9
MT	152,1	162,7	7,0	1.085	1.337,0	23,2	165,0	217,5	31,8
MS	17,7	17,2	(2,8)	1.200	1.379,0	14,9	21,2	23,7	11,8
GO	22,6	18,3	(19,2)	2.300	1.931,0	(16,0)	52,0	35,3	(32,1)
DF	0,6	0,5	(16,7)	2.536	2.400,0	(5,4)	1,5	1,2	(20,0)
SOUTHEAST	208,7	188,7	(9,6)	1.478	1.387,0	(6,2)	308,5	261,7	(15,2)
MG	158,4	148,0	(6,6)	1.450	1.317,0	(9,2)	229,7	194,9	(15,2)
ES	11,6	9,0	(22,5)	757	865,0	14,3	8,8	7,8	(11,4)
RJ	2,1	1,7	(19,0)	980	1.177,0	20,1	2,1	2,0	(4,8)
SP	36,6	30,0	(18,0)	1.856	1.901,0	2,4	67,9	57,0	(16,1)
SOUTH	271,6	305,0	12,3	1.387	1.349,0	(2,7)	376,8	411,4	9,2
PR	226,5	263,9	16,5	1.429	1.350,0	(5,5)	323,7	356,3	10,1
SC	23,3	21,6	(7,5)	1.043	1.259,0	20,7	24,3	27,2	11,9
RS	21,8	19,5	(10,5)	1.319	1.429,0	8,3	28,8	27,9	(3,1)
NORTH/NORTHEAST	721,3	611,9	(15,2)	193	293,0	51,8	138,9	179,1	28,9
CENTER-SOUTH	673,3	692,4	2,8	1.374	1.373,0	(0,1)	925,0	950,8	2,8
BRAZIL	1.394,6	1.304,3	(6,5)	763	866,0	13,5	1.063,9	1.129,9	6,2

SOURCE: CONAB - Suvey: Aug/2013

EDIBLE THIRD CROP

For edible beans third crop, in view of the planting schedule and methodology applied in estimates, previous crop areas were repeated and the average yielding of past five years, discharging atypical years and aggregating technological gain were applied

For edible beans third crop, in view of the planting schedule, sowing may be extended until August. Area estimate is that it should be around 662.2 thousand hectares, with average productivity of 2,475 kg/ha in the Center-South region. This high productivity at this time of the year is due to irrigated and high technology farming in Mato Grosso, Goiás, the Federal District and Minas Gerais.

Edible beans third crop farming in Minas Gerais, which started in April and it may be extended until August, was boosted by good market prices throughout the year. Edible beans area is estimated in 85.0 thousand hectares, an increase of 3.3% when compared to previous season, while it may still be reevaluated in the coming assessment. Edible beans crops are now predominantly in germination and vegetative development stages. Earlier sowings are now in blossoming, maturation, and beginning of harvesting stages. Expected average productivity in the state is 2,555 kg/ha, as crops are highly technified, and irrigated, with predicted yield of 217.2 thousand tons, practically the same yield of past crop.

The *Instituto Mineiro de Agropecuária* (IMA), jointly with the Federal District and the state of Goiás have delimited some municipalities from both states and the whole Federal District area and established a sanitary void. It was established in 16 municipalities in the Northwest region of Minas Gerais, main edible beans producing region, targeting controlling the whitefly that is the vector of the golden mosaic virus, which drastically reduces edible beans plant productivity. The sanitary void, in principle, was set for the period of September 15 to October 15, period when there shall not be any live edible beans plant, and whose planting deadline would have been June 15. However, aiming at meeting corn seed producers, whose harvesting schedule progresses into winter edible beans planting, the IMA, for this season, allowed that planting would be extended until June 30 in farms located in altitude of 700 meters above sea level, and until July 15 for altitude below the 700 meters mark.

In the state of Goiás, edible beans third crop that, under irrigation and application of chemical inputs and irrigation, suffers with pests and diseases attacks, mainly of the whitefly, increase production costs. The area retreat is due to these factors, in addition to more attractive profits in producing seeds under central pivot and problems related to low irrigation water availability in dams that feed the irrigation systems. Some irrigated crops, in harvesting process, have had good immediate trading due to good market prices. Planted area shall be reduced in 5.2% and yield shall reach around 109.8 thousand tons.

It is estimated that edible beans total area, considering all three crops, shall reach almost 3.1 million hectares, 5.2% smaller than in past season. National edible beans yield shall reach 2.83 million tons, 3.1% smaller than the last crop.

Table 13
BEANS 3rd CROP
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop (a)	12/13 Crop (b)	VAR. % (b/a)	11/12 Crop (c)	12/13 Crop (d)	VAR. % (d/c)	11/12 Crop (e)	12/13 Crop (f)	VAR. % (f/e)
NORTH	63,2	54,7	(13,4)	858	777,0	(9,4)	54,2	42,5	(21,6)
PA	48,1	48,1	-	705	705,0	-	33,9	33,9	-
TO	15,1	6,6	(55,9)	1.347	1.305,0	(3,1)	20,3	8,6	(57,6)
NORTHEAST	381,0	417,1	9,5	277	526,0	89,9	105,6	219,3	107,7
CE	7,6	11,4	50,2	65	450,0	592,3	0,5	5,1	920,0
PE	122,0	133,7	9,6	180	400,0	122,2	22,0	53,5	143,2
AL	36,1	39,0	8,0	460	465,0	1,1	16,6	18,1	9,0
SE	28,0	30,5	8,9	702	672,0	(4,3)	19,7	20,5	4,1
BA	187,3	202,5	8,1	250	603,0	141,2	46,8	122,1	160,9
MID-WEST	67,0	71,5	6,7	2.629	2.535,0	(3,6)	176,2	181,2	2,8
MT	20,2	26,9	33,2	2.207	2.078,0	(5,8)	44,6	55,9	25,3
MS	0,4	0,4	-	1.340	1.340,0	-	0,5	0,5	-
GO	41,4	39,2	(5,2)	2.779	2.801,0	0,8	115,1	109,8	(4,6)
DF	5,0	5,0	-	3.200	3.000,0	(6,3)	16,0	15,0	(6,3)
SOUTHEAST	108,7	113,0	4,0	2.549	2.517,0	(1,3)	277,1	284,5	2,7
MG	82,3	85,0	3,3	2.615	2.555,0	(2,3)	215,2	217,2	0,9
SP	26,4	28,0	5,9	2.345	2.402,0	2,4	61,9	67,3	8,7
SOUTH	6,2	5,9	(4,8)	952	950,0	(0,2)	5,9	5,6	(5,1)
PR	6,2	5,9	(4,8)	952	950,0	(0,2)	5,9	5,6	(5,1)
NORTH/NORTHEAST	444,2	471,8	6,2	360	555,0	54,2	159,8	261,8	63,8
CENTER-SOUTH	181,9	190,4	4,7	2.524	2.475,0	(1,9)	459,2	471,3	2,6
BRAZIL	626,1	662,2	5,8	989	1.107,0	11,9	619,0	733,1	18,4

SOURCE: CONAB - Suvey: Aug/2013

TOTAL EDIBLE BEANS

Table 14
TOTAL BEANS (1st, 2nd and 3rd CROPS)
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %
	(a)	(b)	(b/a)	(c)	(d)	(d/c)	(e)	(f)	(f/e)
NORTH	158,5	133,6	(15,7)	782	792,0	1,3	124,0	106,1	(14,4)
RR	3,0	3,0	-	667	660,0	(1,0)	2,0	2,0	-
RO	52,3	39,5	(24,5)	694	812,0	17,0	36,3	32,1	(11,6)
AC	12,6	12,3	(2,4)	600	580,0	(3,3)	7,6	7,1	(6,6)
AM	5,9	5,7	(3,4)	900	897,0	(0,3)	5,3	5,1	(3,8)
AP	1,1	1,6	45,5	840	910,0	8,3	0,9	1,5	66,7
PA	48,1	48,1	-	705	705,0	-	33,9	34,1	0,6
TO	35,5	23,4	(34,0)	1.071	1.032,3	(3,6)	38,0	24,2	(36,3)
NORTHEAST	1.503,9	1.419,0	(5,6)	192	303,0	57,8	289,3	430,3	48,7
MA	74,7	90,1	20,6	367	459,5	25,3	27,4	41,4	51,1
PI	230,5	199,3	(13,5)	158	131,4	(17,1)	36,5	26,2	(28,2)
CE	433,6	347,9	(19,8)	76	179,2	136,4	32,9	62,3	89,4
RN	7,2	12,4	72,2	260	304,0	16,9	1,9	3,8	100,0
PB	36,8	52,8	43,5	79	373,0	372,2	2,9	19,7	579,3
PE	229,7	215,1	(6,4)	147	295,9	101,1	33,8	63,7	88,5
AL	36,1	39,0	8,0	460	465,0	1,1	16,6	18,1	9,0
SE	28,0	30,5	8,9	702	672,0	(4,3)	19,7	20,5	4,1
BA	427,3	431,9	1,1	275	404,4	46,9	117,6	174,6	48,5
MID-WEST	342,1	346,4	1,3	1.762	1.680,0	(4,7)	603,0	582,0	(3,5)
MT	180,8	201,9	11,7	1.241	1.437,7	15,8	224,4	290,3	29,4
MS	19,3	19,8	2,6	1.262	1.388,3	10,0	24,4	27,5	12,7
GO	126,2	106,5	(15,6)	2.441	2.195,1	(10,1)	308,1	233,8	(24,1)
DF	15,8	18,2	15,2	2.917	1.671,6	(42,7)	46,1	30,4	(34,1)
SOUTHEAST	608,1	566,8	(6,8)	1.666	1.461,0	(12,3)	1.012,8	827,9	(18,3)
MG	422,3	419,7	(0,6)	1.572	1.345,8	(14,4)	663,7	564,8	(14,9)
ES	18,3	15,5	(15,3)	800	807,1	0,9	14,6	12,5	(14,4)
RJ	3,7	3,0	(18,9)	969	1.074,3	10,9	3,6	3,2	(11,1)
SP	163,8	128,6	(21,5)	2.020	1.923,9	(4,8)	330,9	247,4	(25,2)
SOUTH	649,5	627,9	(3,3)	1.369	1.405,0	2,6	889,3	881,9	(0,8)
PR	481,4	480,0	(0,3)	1.408	1.380,1	(2,0)	677,9	662,5	(2,3)
SC	86,8	76,7	(11,6)	1.351	1.626,1	20,4	117,3	124,7	6,3
RS	81,3	71,2	(12,4)	1.157	1.330,2	14,9	94,1	94,7	0,6
NORTH/NORTHEAST	1.662,4	1.552,6	(6,6)	249	345,0	38,6	413,3	536,4	29,8
CENTER-SOUTH	1.599,7	1.541,1	(3,7)	1.566	1.487,0	(5,0)	2.505,1	2.291,8	(8,5)
BRAZIL	3.262,1	3.093,7	(5,2)	895	914,0	2,1	2.918,4	2.828,2	(3,1)

SOURCE: CONAB - Suvey: Aug/2013

Supply and Demand

COMMON CARIOCA EDIBLE BEANS

Better quality produce price remain in downward trend in the Sao Paulo's wholesale market. Increased supply of producing originated from the state of Sao Paulo and from the states of Minas Gerais and Goias has eased the spirits at Sao Paulo Little Commodity Exchange (*Bolsinha de Cereais de Sao Paulo*).

Price retreat observed since mid-July has directly influenced the price of 30 kg package, leading packers to a better trading condition with retailer network, which presented a significant drop in Sales during June.

The 2nd crop, or dry season crop, in the Center-South region is completed, while it is estimated that 90% of yield has been traded by farmers in the state of Parana.

The third and last crop of the 2012-2013 season began its harvest, but still in small quantities. In addition to irrigated farming in the country's Center-West and Southeast regions, there will be the dry season crop farmed in the states of Alagoas, Sergipe, and the

Northeast portion of Bahia. The yield from this planting will complement the supply in the Northeast region, in addition to supplying other consuming regions.

It is important to highlight that the quantity to be harvest in Northeast portion of Bahia is, undoubtedly, the focus of attention since it represents, along with the yield from Alagoas and Sergipe, around 21% of predicted yield for the winter crop. This crop that usually is jeopardized by the weather, this season has benefited by well distributed rainfall with good volume. If there is not excessive rainfall during harvesting to the point of harming produce productivity and quality, which is very unlikely, there might be a strong downward pressure in market prices.

Thus, it is expected a lower pressure by demand from August when harvest will start at the Northeast region, in addition to continued irrigated farming that shall extend until October, because of planting carried out at end of July due to good market prices.

COMMON BLACK EDIBLE BEANS

The supply scenario is very tight, since larger portion of the domestic yield has already been consumed along with the early imports from Argentina during the period of January to May targeted to complement the domestic supply.

Prices remain very remunerative with behavior directly related to the quantity of available produce in Argentina and China, as there is other countries' interest in the exportable surplus from these two countries.

In view of this scenario, the expectation is that prices in second semester have good chances of remaining steady according to current supply balance that is very limited.

It is predicted the following scenario for the ongoing season: first crop yield, assessed in the field survey undertaken in July by Conab, plus forecasts for the second and third crops, a total yield of 2,828.2 thousand tons is expected, which added to the carryover stocks and projected imports of 400.0 thousand tons, will provide a supply of 3.6 million tons, generating a carryover stock of just 152.0 thousand tons.

SUNFLOWER

Table 15
SUNFLOWER
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop (a)	12/13 Crop (b)	VAR. % (b/a)	11/12 Crop (c)	12/13 Crop (d)	VAR. % (d/c)	11/12 Crop (e)	12/13 Crop (f)	VAR. % (f/e)
NORTHEAST	0,2	0,5	150,0	715	422,0	(41,0)	0,2	0,2	-
CE	0,1	0,2	100,0	780	456,0	(41,5)	0,1	0,1	-
BA	0,1	0,3	175,0	650	400,0	(38,5)	0,1	0,1	-
MID-WEST	66,0	47,7	(27,7)	1.579	1.732,0	9,7	104,2	82,6	(20,7)
MT	47,1	44,6	(5,3)	1.686	1.738,0	3,1	79,4	77,5	(2,4)
MS	5,0	0,9	(82,8)	1.200	1.600,0	33,3	6,0	1,4	(76,7)
GO	13,9	2,2	(83,9)	1.355	1.660,0	22,5	18,8	3,7	(80,3)
SOUTHEAST	4,3	11,0	155,8	1.395	1.500,0	7,5	6,0	16,5	175,0
MG	4,3	11,0	155,8	1.395	1.500,0	7,5	6,0	16,5	175,0
SOUTH	4,0	3,4	(15,0)	1.507	1.394,0	(7,5)	6,0	4,8	(20,0)
PR	0,7	0,7	-	1.310	1.083,0	(17,3)	0,9	0,8	(11,1)
RS	3,3	2,7	(18,0)	1.549	1.475,0	(4,8)	5,1	4,0	(21,6)
NORTH/NORTHEAST	0,2	0,5	150,0	715	422,0	(41,0)	0,2	0,2	-
CENTER-SOUTH	74,3	62,1	(16,4)	1.565	1.672,0	6,8	116,2	103,9	(10,6)
BRAZIL	74,5	62,6	(16,0)	1.563	1.662,0	6,3	116,4	104,1	(10,6)

SOURCE: CONAB - Suvey: Aug/2013

CASTOR BEANS

Table 16
CASTOR BEAN
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %
	(a)	(b)	(b/a)	(c)	(d)	(d/c)	(e)	(f)	(f/e)
NORTHEAST	123,9	84,8	(31,6)	172	157	(8,7)	21,4	13,3	(37,9)
PI	0,8	0,9	12,5	96	74	(22,9)	0,1	0,1	-
CE	33,8	12,8	(62,1)	79	95	20,3	2,7	1,2	(55,6)
RN	0,1	-	(100,0)	571	-	(100,0)	0,1	-	(100,0)
PE	2,7	1,9	(30,0)	231	267	15,6	0,6	0,5	(16,7)
BA	86,5	69,2	(20,0)	207	166	(19,8)	17,9	11,5	(35,8)
SOUTHEAST	3,3	2,1	(36,4)	862	694	(19,5)	2,9	1,5	(48,3)
MG	2,8	2,0	(28,6)	738	630	(14,6)	2,1	1,3	(38,1)
SP	0,5	0,1	(80,000)	1.554	1.980	27,4	0,8	0,2	(75,0)
SOUTH	1,0	0,9	(10,000)	620	600	(3,2)	0,6	0,5	(16,7)
PR	1,0	0,9	(10,000)	620	600	(3,2)	0,6	0,5	(16,7)
MORTH/NORTHEAST	123,9	84,8	(31,6)	172	157	(8,7)	21,4	13,3	(37,9)
CENTER-SOUTH	4,3	3,0	(30,2)	805	666	(17,3)	3,5	2,0	(42,9)
BRAZIL	128,2	87,8	(31,5)	193	174	(9,8)	24,9	15,3	(38,6)

SOURCE: CONAB - Suvey: Aug/2013

CORN FIRST CROP

In this tenth assessment of the 2012/13 crop, one realizes that, when comparing to previous crop performance, there was a slight reduction in corn first crop planted area, from 7,558.5 thousand hectares in the past season to 6,902.7 thousand hectares in the current season, representing nationally a difference of 8,7%.

Some adjustments in corn productivity are observed in states of the North and Northeast regions, resulting from supply instability due to rainfall discontinuity in these regions that have contribute to 0.8% reduction when compared to the tenth assessment estimates. This behavior was overly compensated with the adjustments made in the Center-South region, especially in the states of Sao Paulo and Espirito Santo. The national yield of corn – first crop in the current season is now estimated in 35,111.9 thousand tons, representing an accrual of 3.7% when compared to 2012 with a yield of 33,867.1 thousand tons.

Table 17
CORN 1ST CROP
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %
	(a)	(b)	(b/a)	(c)	(d)	(d/c)	(e)	(f)	(f/e)
NORTH	456,7	397,8	(12,9)	2.668	2.880	7,9	1.218,3	1.145,7	(6,0)
RR	6,5	6,5	-	2.000	2.000	-	13,0	13,0	-
RO	93,9	76,6	(18,4)	2.201	2.187	(0,6)	206,7	167,5	(19,0)
AC	43,8	46,1	5,3	2.290	2.421	5,7	100,3	111,6	11,3
AM	14,4	12,9	(10,4)	2.500	2.390	(4,4)	36,0	30,8	(14,4)
AP	2,6	2,3	(12,3)	825	882	6,9	2,1	2,0	(4,8)
PA	236,3	199,1	(15,7)	2.538	2.841	11,9	599,7	565,6	(5,7)
TO	59,2	54,3	(8,3)	4.400	4.700	6,8	260,5	255,2	(2,0)
NORTHEAST	1.917,3	1.773,6	(7,5)	1.713	1.720	0,4	3.284,3	3.050,3	(7,1)
MA	384,0	384,0	-	1.376	2.078	51,0	528,4	798,0	51,0
PI	330,7	366,1	10,7	2.108	1.337	(36,6)	697,1	489,5	(29,8)
CE	520,6	408,7	(21,5)	142	140	(1,4)	73,9	57,2	(22,6)
RN	7,6	13,3	75,2	337	495	46,9	2,6	6,6	153,8
PB	39,8	49,0	23,0	106	554	422,6	4,2	27,1	545,2
PE	205,8	94,5	(54,1)	117	167	42,7	24,1	15,8	(34,4)
AL	0,0	0,0	-	-	-	-	-	-	-
SE	0,0	0,0	-	-	-	-	-	-	-
BA	428,8	458,0	6,8	4.557	3.616	(20,6)	1.954,0	1.656,1	(15,2)
MID-WEST	743,6	565,8	(23,9)	7.697	7.663	(0,4)	5.723,2	4.335,8	(24,2)
MT	94,5	75,6	(20,0)	6.185	7.079	14,5	584,5	535,2	(8,4)
MS	68,2	48,0	(29,6)	6.729	7.700	14,4	458,9	369,6	(19,5)
GO	547,3	407,2	(25,6)	8.000	7.633	(4,6)	4.378,4	3.108,2	(29,0)
DF	33,6	35,0	4,2	8.969	9.222	2,8	301,4	322,8	7,1
SOUTHEAST	1.813,0	1.753,4	(3,3)	5.942	6.067	2,1	10.772,7	10.637,5	(1,3)
MG	1.218,5	1.149,8	(5,6)	5.978	5.944	(0,6)	7.284,2	6.834,4	(6,2)
ES	31,5	24,1	(23,5)	2.429	2.547	4,9	76,5	61,4	(19,7)
RJ	6,1	5,9	(3,3)	2.435	2.250	(7,6)	14,9	13,3	(10,7)
SP	556,9	573,6	3,0	6.100	6.500	6,6	3.397,1	3.728,4	9,8
SOUTH	2.627,9	2.412,1	(8,2)	4.897	6.609	35,0	12.868,6	15.942,6	23,9
PR	977,7	878,1	(10,2)	6.729	8.119	20,7	6.578,9	7.129,3	8,4
SC	536,7	500,7	(6,7)	5.491	6.850	24,7	2.947,0	3.429,8	16,4
RS	1.113,5	1.033,3	(7,2)	3.002	5.210	73,6	3.342,7	5.383,5	61,1
NORTH/NORTHEAST	2.374,0	2.171,4	(8,5)	1.897	1.932	1,8	4.502,6	4.196,0	(6,8)
CENTER-SOUTH	5.184,5	4.731,3	(8,7)	5.664	6.534	15,4	29.364,5	30.915,9	5,3
BRAZIL	7.558,5	6.902,7	(8,7)	4.481	5.087	13,5	33.867,1	35.111,9	3,7

SOURCE: CONAB - Suvey: Aug/2013

CORN SECOND CROP

Corn second crop planting underwent a slight delay due to strong rains in early February coinciding with soybeans precocious cultivars harvest in major producing states in the Center-South region.

Weather regularization occurring later provided incentive for strong increase in planted area throughout the region. This performance was enough to establish a record yield in the second crop, reaching nationally 45,141.4 thousand tons compared to 39,112.7 thousand tons in 2012, representing an accrual of 15.4%, when compared to the previous season. It is worth informing that these estimates may still undergo changes due to combination of lack of storage facilities, particularly in the state of Mato Grosso and the current low prices practice in the market. These factors are influencing the trade of commodity that continues in slow pace, which reverberates in greater delay in harvesting, since farmers prefer to leave the produce in the field, even if aware of implication that this will cause to their profitability.

The combination of these factor will provide a record corn crop in Brazil of

79,966.6 thousand tons, representing an evolution of 9.6% regarding past season's yield.

Supply and Demand

Corn is undergoing, since mid-July, strong price downward trend in the Chicago Exchange for September 2013 contracts, due to contract clearances in July 2013 as well as and good crop condition in the United States, which are over 60.0% of good/excellent conditions, according to the USDA.

Therefore, it is very likely that the United States crop will reach 354.0 million tons as estimated by the USDA, generating a renewal of their domestic and worldwide stocks. In this context, prices are pushed toward level lower than US\$ 5.00/bushel (US\$ 196.83/ton).

In the domestic market, in addition to low prices in Chicago, the excellent Brazilian crop that still is in the harvest process are pushing prices downward. There is information that corn prices of R\$ 9.00/60 Kg in the state of Mato Grosso, which is well below the minimum price of R\$ 17.46/60 Kg paid for in some regions of Goiás and Mato Grosso do Sul.

In the state of Paraná, with closeness with harbor facilities and a more valued dollar, prices still are around R\$ 19.00/60 Kg, that is, above the minimum price. But, as the second crop harvest in the state still is in its initial stage, it is probable that those prices will fall below the minimum price.

Table 18
CORN 2ND CROP
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %
	(a)	(b)	(b/a)	(c)	(d)	(d/c)	(e)	(f)	(f/e)
NORTH	112,8	130,5	15,7	3.849	4.036	4,9	434,2	526,6	21,3
RO	68,4	89,6	31,0	3.612	3.728	3,2	247,1	334,0	35,2
TO	44,4	40,9	(7,9)	4.215	4.710	11,7	187,1	192,6	2,9
NORTHEAST	504,2	626,5	24,3	2.141	2.775	29,6	1.079,8	1.738,6	61,0
MA	70,6	133,7	89,4	2.879	4.214	46,4	203,3	563,4	177,1
PI	20,9	13,7	(34,6)	4.311	2.893	(32,9)	90,1	39,6	(56,0)
AL	29,7	34,4	15,8	754	637	(15,5)	22,4	21,9	(2,2)
SE	206,8	203,3	(1,7)	2.629	3.019	14,8	543,7	613,8	12,9
BA	176,2	241,4	37,0	1.250	2.071	65,7	220,3	499,9	126,9
MID-WEST	4.548,2	5.576,3	22,6	5.583	5.344	(4,3)	25.393,1	29.801,9	17,4
MT	2.645,4	3.349,1	26,6	5.680	5.736	1,0	15.025,9	19.210,4	27,8
MS	1.199,5	1.431,0	19,3	5.100	4.600	(9,8)	6.117,5	6.582,6	7,6
GO	694,6	778,6	12,1	6.043	4.968	(17,8)	4.197,5	3.868,1	(7,8)
DF	8,7	17,6	102,0	6.000	8.000	33,3	52,2	140,8	169,7
SOUTHEAST	429,3	461,2	7,4	4.722	4.643	(1,7)	2.027,4	2.141,5	5,6
MG	94,3	118,8	26,0	5.548	5.200	(6,3)	523,2	617,8	18,1
SP	335,0	342,4	2,2	4.490	4.450	(0,9)	1.504,2	1.523,7	1,3
SOUTH	2.025,1	2.169,2	7,1	5.026	5.040	0,3	10.178,2	10.932,8	7,4
PR	2.025,1	2.169,2	7,1	5.026	5.040	0,3	10.178,2	10.932,8	7,4
NORTH/NORTHEAST	617,0	757,0	22,7	2.454	2.993	22,0	1.514,0	2.265,2	49,6
CENTER= SOUTH	7.002,6	8.206,7	17,2	5.369	5.225	(2,7)	37.598,7	42.876,2	14,0
BRAZIL	7.619,6	8.963,7	17,6	5.133	5.036	(1,9)	39.112,7	45.141,4	15,4

SOURCE: CONAB - Suvey: Aug/2013

TOTAL CORN

Table 19
TOTAL CORN (1st and 2nd CROP)
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop (a)	12/13 Crop (b)	VAR. % (b/a)	11/12 Crop (c)	12/13 Crop (d)	VAR. % (d/c)	11/12 Crop (e)	12/13 Crop (f)	VAR. % (f/e)
NORTH	569,5	528,3	(7,2)	2.902	3.166	9,1	1.652,4	1.672,4	1,2
RR	6,5	6,5	-	2.000	2.000	-	13,0	13,0	-
RO	162,3	166,2	2,4	2.796	3.018	7,9	453,7	501,6	10,6
AC	43,8	46,1	5,3	2.290	2.421	5,7	100,3	111,6	11,3
AM	14,4	12,9	(10,4)	2.500	2.390	(4,4)	36,0	30,8	(14,4)
AP	2,6	2,3	(11,5)	825	882	6,9	2,1	2,0	(4,8)
PA	236,3	199,1	(15,7)	2.538	2.841	11,9	599,7	565,6	(5,7)
TO	103,6	95,2	(8,1)	4.321	4.704	8,9	447,6	447,8	-
NORTHEAST	2.421,5	2.400,1	(0,9)	1.802	1.995	10,7	4.364,0	4.789,0	9,7
MA	454,6	517,7	13,9	1.609	2.630	63,4	731,6	1.361,4	86,1
PI	351,6	379,8	8,0	2.239	1.393	(37,8)	787,2	529,1	(32,8)
CE	520,6	408,7	(21,5)	142	140	(1,4)	73,9	57,2	(22,6)
RN	7,6	13,3	75,0	337	495	46,9	2,6	6,6	153,8
PB	39,8	49,0	23,1	106	554	422,6	4,2	27,1	545,2
PE	205,8	94,5	(25,0)	117	167	42,7	24,1	15,8	(34,4)
AL	29,7	34,4	15,8	754	637	(15,5)	22,4	21,9	(2,2)
SE	206,8	203,3	(1,7)	2.629	3.019	14,8	543,7	613,8	12,9
BA	605,0	699,4	15,6	3.594	3.083	(14,2)	2.174,3	2.156,1	(0,8)
MID-WEST	5.291,8	6.142,1	16,1	5.880	5.558	(5,5)	31.116,3	34.137,6	9,7
MT	2.739,9	3.424,7	25,0	5.697	5.766	1,2	15.610,4	19.745,6	26,5
MS	1.267,7	1.479,0	16,7	5.188	4.701	(9,4)	6.576,4	6.952,2	5,7
GO	1.241,9	1.185,8	(4,5)	6.905	5.883	(14,8)	8.575,9	6.976,2	(18,7)
DF	42,3	52,6	24,3	8.358	8.813	5,4	353,6	463,6	31,1
SOUTHEAST	2.242,3	2.214,6	(1,2)	5.708	5.770	1,1	12.800,0	12.779,0	(0,2)
MG	1.312,8	1.268,6	(3,4)	5.947	5.874	(1,2)	7.807,4	7.452,2	(4,5)
ES	31,5	24,1	(23,5)	2.429	2.547	4,9	76,5	61,4	(19,7)
RJ	6,1	5,9	(3,3)	2.435	2.250	(7,6)	14,9	13,3	(10,7)
SP	891,9	916,0	2,7	5.495	5.734	4,3	4.901,2	5.252,1	7,2
SOUTH	4.653,0	4.581,3	(1,5)	4.953	5.866	18,4	23.046,8	26.875,4	16,6
PR	3.002,8	3.047,3	1,5	5.580	5.927	6,2	16.757,1	18.062,1	7,8
SC	536,7	500,7	(6,7)	5.491	6.850	24,7	2.947,0	3.429,8	16,4
RS	1.113,5	1.033,3	(7,2)	3.002	5.210	73,6	3.342,7	5.383,5	61,1
NORTH/NORTHEAST	2.991,0	2.928,4	(2,1)	2.012	2.206	9,6	6.016,4	6.461,4	7,4
CENTER-SOUTH	12.187,1	12.938,0	6,2	5.495	5.703	3,8	66.963,1	73.792,0	10,2
BRAZIL	15.178,1	15.866,4	4,5	4.808	5.058	5,2	72.979,5	80.253,4	10,0

SOURCE: CONAB - Suvey: Aug/2013

SOYBEAN

The eleventh assessment of soybeans crop confirmed the excellent performance achieved by this grain during all stages of crop development when compared with previous season.

Soybeans planted area was set in the record of 27,721.5 thousand hectares in this season, presenting an accrual of 10.7% when compared to the 2011-2012 season that farmed 25,042.2 thousand hectares.

As informed in the previous report, the problems seen during the evolution this grain vegetative development, varying from delay in planting because late rains, to occurrence of rainfall coinciding with harvest and incident of rust, particularly in the Center-West region plantation, did not compromise productivity as seriously as first expected.

As consequence, average productivity recorded in the Center-South region, main producing region, presented an accrual of 15.1% when compared to previous season.

This performance made productivity, at national level, to reach an average of 2,938 kg/ha, representing a growth record and increment of 10.8% in relation to 2012.

The effects of these occurrences in the Brazilian crop, in this season, point to a record yield of 81,456.1 thousand tons, compared to 66.383.0 thousand tons in 2012, which represents an increase of 22.7%.

Supply and Demand

Even after disclosure of the international supply and demand scenario by the American Department of Agriculture - USDA, practically maintaining the figures disclose in May and June 2013, prices paid in the international market in early July still were influenced by weather and low American stocks, remaining well above the historical average for the period, with average value of US\$ 583.37/ton, but they did not sustain, and prices had a significant fall to US\$ 524.99/ton by end of July.

These high international prices directly influenced domestic prices, which added to record export for July of approximately 5.66 million tons and strong valuation of the dollar in face of the Brazilian Real made price to remain well above the historical average for June, with average value of R\$ 51.48/60kg in Sorriso - MT and R\$ 58.55/60kg in Cascavel - PR.

Brazilian soybean exports increased 17.37% compared with the first seven months in 2012 according to the Ministry of Development, Industry and Foreign Trade, in spite of the logistics problems. Thus, it is estimated that Brazil will export approximately 37.81 million tons in 2013.

Domestic consumption is estimated in 42.40 million tons, producing approximately 29.73 million tons of soybean bran and 7.53 million liters of oil.

The carryover stock for the 2012-13 season is estimated in 1.83 million tons.

Table 20
SOYBEAN
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %
	(a)	(b)	(b/a)	(c)	(d)	(d/c)	(e)	(f)	(f/e)
NORTH	717,6	894,4	24,6	3.027	2.954	(2,4)	2.172,2	2.641,9	21,6
RR	3,7	5,0	35,0	2.800	2.800	-	10,4	14,0	34,6
RO	143,5	167,7	16,9	3.221	3.216	(0,2)	462,2	539,3	16,7
PA	119,2	172,2	44,5	2.657	3.207	20,7	316,7	552,2	74,4
TO	451,2	549,5	21,8	3.065	2.796	(8,8)	1.382,9	1.536,4	11,1
NORTHEAST	2.117,1	2.414,3	14,0	2.880	2.193	(23,9)	6.096,3	5.294,8	(13,1)
MA	559,7	586,0	4,7	2.949	2.877	(2,4)	1.650,6	1.685,9	2,1
PI	444,6	546,4	22,9	2.841	1.678	(40,9)	1.263,1	916,9	(27,4)
BA	1.112,8	1.281,9	15,2	2.860	2.100	(26,6)	3.182,6	2.692,0	(15,4)
MID-WEST	11.495,2	12.778,2	11,2	3.036	2.981	(1,8)	34.904,8	38.091,4	9,1
MT	6.980,5	7.818,2	12,0	3.130	3.010	(3,8)	21.849,0	23.532,8	7,7
MS	1.815,0	2.017,0	11,1	2.550	2.880	12,9	4.628,3	5.809,0	25,5
GO	2.644,7	2.888,0	9,2	3.120	2.965	(5,0)	8.251,5	8.562,9	3,8
DF	55,0	55,0	-	3.200	3.395	6,1	176,0	186,7	6,1
SOUTHEAST	1.606,2	1.758,2	9,5	2.899	3.086	6,5	4.656,3	5.425,9	16,5
MG	1.024,0	1.121,2	9,5	2.987	3.010	0,8	3.058,7	3.374,8	10,3
SP	582,2	637,0	9,4	2.744	3.220	17,3	1.597,6	2.051,1	28,4
SOUTH	9.106,1	9.876,4	8,5	2.037	3.038	49,1	18.553,4	30.002,7	61,7
PR	4.460,6	4.752,8	6,6	2.453	3.348	36,5	10.941,9	15.912,4	45,4
SC	448,3	505,0	12,7	2.420	3.080	27,3	1.084,9	1.555,4	43,4
RS	4.197,2	4.618,6	10,0	1.555	2.714	74,5	6.526,6	12.534,9	92,1
NORTH/NORTHEAST	2.834,7	3.308,7	16,7	2.917	2.399	(17,8)	8.268,5	7.936,7	(4,0)
CENTER-SOUTH	22.207,5	24.412,8	9,9	2.617	3.012	15,1	58.114,5	73.520,0	26,5
BRAZIL	25.042,2	27.721,5	10,7	2.651	2.938	10,8	66.383,0	81.456,7	22,7

SOURCE: CONAB - Suvey: Aug/2013

SORGHUM

Table 21
SORGHUM
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2011/2012 AND 2012/2013 CROPS

REGION / STATE	AREA (In thousand ha)			YIELD (In kg/ha)			PRODUCTION (In thousand t)		
	11/12 Crop (a)	12/13 Crop (b)	VAR. % (b/a)	11/12 Crop (c)	12/13 Crop (d)	VAR. % (d/c)	11/12 Crop (e)	12/13 Crop (f)	VAR. % (f/e)
NORTH	21,5	19,1	-	1.736	1.923	10,8	37,3	36,7	(1,6)
TO	21,5	19,1	(11,2)	1.736	1.923	10,8	37,3	36,7	(1,6)
NORTHEAST	101,9	92,3	-	758	397	(47,6)	77,2	36,7	(52,5)
PI	7,7	1,2	(84,0)	2.130	1.080	(49,3)	16,4	1,3	-
CE	0,3	0,6	100,0	236	125	(47,0)	0,1	0,1	-
RN	1,1	2,2	97,0	930	1.000	7,5	1,0	2,2	120,0
PB	0,2	0,2	-	1.500	800	(46,7)	0,3	0,2	(33,3)
PE	0,6	1,0	66,6	582	625	7,4	0,3	0,6	100,0
BA	92,0	87,1	(5,3)	642	371	(42,2)	59,1	32,3	(45,3)
MID-WEST	483,0	478,4	-	3.160	3.011	(4,7)	1.526,2	1.440,5	(5,6)
MT	151,4	163,2	7,8	2.780	2.711	(2,5)	420,9	442,4	5,1
MS	29,0	15,0	(48,3)	2.700	2.800	3,7	78,3	42,0	(46,4)
GO	296,5	291,8	(1,6)	3.369	3.147	(6,6)	998,9	918,3	(8,1)
DF	6,1	8,4	37,7	4.600	4.500	(2,2)	28,1	37,8	34,5
SOUTHEAST	150,3	170,7	-	3.460	2.895	(16,3)	519,9	494,2	(4,9)
MG	126,1	151,1	19,8	3.519	2.832	(19,5)	443,7	427,9	(3,6)
SP	24,2	19,6	(19,1)	3.150	3.382	7,4	76,2	66,3	(13,0)
SOUTH	30,2	28,4	-	2.030	2.465	21,4	61,3	70,0	14,2
PR	1,8000	-	-	3.700	-	(100,0)	6,7	-	(100,0)
RS	28,4	28,4	-	1.924	2.465	28,1	54,6	70,0	28,2
MORTH/NORTHEAST	123,4	111,4	(9,7)	928	659	(29,0)	114,5	73,4	(35,9)
CENTER-SOUTH	663,5	677,5	2,1	3.176	2.959	(6,8)	2.107,4	2.004,7	(4,9)
BRAZIL	786,9	788,9	0,3	2.824	2.634	(6,7)	2.221,9	2.078,1	(6,5)

SOURCE: CONAB - Suvey: Aug/2013

WINTER CROPS

OAT

Table 22
OAT 2013
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2012/2013 AND 2013/2014 CROPS

REGION/STATE	AREA (In thousand ha)			PRODUCTIVITY (In kg/ha)			PRODUCTION (In thousand t)		
	12/13 Crop (a)	13/14 Crop (b)	VAR. % (b/a)	12/13 Crop (c)	13/14 Crop (d)	VAR. % (d/c)	12/13 Crop (e)	13/14 Crop (f)	VAR. % (f/e)
MID-WEST	7,0	5,9	(15,7)	1.071	1.695	58,3	7,5	10,0	33,3
MS	7,0	5,9	(15,2)	1.078	1.694	57,1	7,5	10,0	33,3
SOUTH	161,7	166,6	3,0	2.184	2.345	7,4	353,2	390,7	10,6
PR	61,9	64,1	3,5	2.285	2.620	14,7	141,4	167,9	18,7
RS	99,8	102,5	2,7	2.122	2.174	2,5	211,8	222,8	5,2
CENTER-SOUTH	168,7	172,5	2,3	2.138	2.323	8,7	360,7	400,7	11,1
BRAZIL	168,7	172,5	2,3	2.138	2.323	8,7	360,7	400,7	11,1

SOURCE: CONAB - Suvey: Aug/2013

CANOLA

Table 23
CANOLA 2013
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2012/2013 AND 2013/2014 CROPS

REGION/STATE	AREA (In thousand ha)			PRODUCTIVITY (In kg/ha)			PRODUCTION (In thousand t)		
	12/13 Crop	13/14 Crop	VAR. %	12/13 Crop	13/14 Crop	VAR. %	12/13 Crop	13/14 Crop	VAR. %
	(a)	(b)	(b/a)	(c)	(d)	(d/c)	(e)	(f)	(f/e)
MID-WEST	2,3	2,3	-	1.043	1.043	-	2,4	2,4	-
MS	2,3	2,3	-	1.033	1.033	-	2,4	2,4	-
SOUTH	41,5	36,0	(13,3)	1.400	1.450	3,6	58,1	52,2	(10,2)
PR	12,9	14,6	13,0	1.667	1.759	5,5	21,5	25,7	19,5
SC	0,4	-	(100,0)	775	-	(100,0)	0,3	-	(100,0)
RS	28,2	21,4	(24,2)	1.287	1.240	(3,7)	36,3	26,5	(27,0)
CENTER-SOUTH	43,8	38,3	(12,6)	1.381	1.426	3,3	60,5	54,6	(9,8)
BRAZIL	43,8	38,3	(12,6)	1.381	1.426	3,3	60,5	54,6	(9,8)

SOURCE: CONAB - Suvey: Aug/2013

RYE

Table 24
RYE 2013
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2012/2013 AND 2013/2014 CROPS

REGION/STATE	AREA (In thousand ha)			PRODUCTIVITY (In kg/ha)			PRODUCTION (In thousand t)		
	12/13 Crop	13/14 Crop	VAR. %	12/13 Crop	13/14 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %
	(a)	(b)	(b/a)	(c)	(d)	(d/c)	(e)	(f)	(f/e)
SOUTH	2,3	2,3	-	1.609	1.826	13,5	3,7	4,2	13,5
PR	0,8	0,9	15,0	1.590	2.149	35,2	1,3	1,9	46,2
RS	1,5	1,4	(8,6)	1.570	1.632	3,9	2,4	2,3	(4,2)
CENTER-SOUTH	2,3	2,3	-	1.609	1.826	13,5	3,7	4,2	13,5
BRAZIL	2,3	2,3	-	1.609	1.826	13,5	3,7	4,2	13,5

SOURCE: CONAB - Suvey: Aug/2013

BARLEY

Table 25
BARLEY
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2012/2013 AND 2013/2014 CROPS

REGION/STATE	AREA (In thousand ha)			PRODUCTIVITY (In kg/ha)			PRODUCTION (In thousand t)		
	12/13 Crop	13/14 Crop	VAR. %	12/13 Crop	13/14 Crop	VAR. %	11/12 Crop	12/13 Crop	VAR. %
	(a)	(b)	(b/a)	(c)	(d)	(d/c)	(e)	(f)	(f/e)
SOUTH	102,8	92,9	(9,6)	2.794	3.216	15,1	287,2	298,8	4,0
PR	50,8	43,6	(14,1)	3.599	3.974	10,4	182,8	173,3	(5,2)
SC	5,7	1,7	(70,0)	3.000	3.000	-	17,1	5,1	(70,2)
RS	46,3	47,6	2,7	1.885	2.530	34,2	87,3	120,4	37,9
CENTER-SOUTH	102,8	92,9	(9,6)	2.794	3.216	15,1	287,2	298,8	4,0
BRAZIL	102,8	92,9	(9,6)	2.794	3.216	15,1	287,2	298,8	4,0

SOURCE: CONAB - Suvey: Aug/2013

WHEAT

The wheat planted area in the 2013-2014 season shall present an increment of 10.3% when compared to previous crop, reaching 2,122.5 thousand hectares, against 1,895.4 in 2012-2013 season. The recovery of portion of the area that had been farmed in past years is related to improvement in paid prices in the previous season due to reduction

in world and Brazilian yield, which reverberated favorably among farmers, inducing to planting increase.

In the state of Parana, despite the strong competition for area with corn second crop, wheat farming in 2013 shall use 940.9 thousand hectares, which represents an increase of 21.6% when compared to previous crop that was the smallest planted area since the 1980s. Planting has already occurred in 100% of the area and the crop is now in germination (7%), vegetative development (43%), blossoming (31%), fructification (21%), and maturation (1%) stages. The last three stages are susceptible to cold weather, thus, there is possibility of a drop in productivity due to frost. Productivity was reduced from 2,933 kg/ha to 2,840 kg/ha, but possible losses were not totally measured yet. Increase in prices paid to farmers in sale of the 2012 crop, because of smaller world and Brazilian yield, was the main reason inducing farmers to recover part of the area that was not farmed in past years.

Planted area in Rio Grande do Sul shall reach 1,010.4 thousand hectares, representing an increment of 3.5% when compared to previous season, supported by good prices achieved in past crop, currently stimulated by a tight local supply and demand scenario, in addition to the possibility of problems with major international suppliers' yield. Additionally, the supply of new cultivars that are more resistant to diseases and with higher yield potential has contributed to farmers placing their stakes in this grain for the 2013 season.

Planting is completed throughout the state. The last planted areas are located in the Northeast region of the state (Vacaria, Lagoa Vermelha), whose preferred planting schedule is later than in other producing areas in the state of Rio Grande do Sul. In that region, crops are in germination and vegetative development stages, which in the other regions predominates plants tillering and leaf elongation stages. The low temperatures recorded during the assessment week are favoring tiller emission as well as setting up the excellent sanitary status of crops, in addition to favor wheat quality. The ears still are protected and grains mature better because of cold, accruing more nutrients. With few exceptions, all regions will have farmed area increase, in larger or smaller scale, boosted by grain prices and liquidity, allied to predictions of stable market and favorable weather for the crop, a fact that until now is confirmed. The increase of using available technology in this crop derives, in addition to those predictions, from greater farmers capitalization due to good results achieved in the last summer crop.

Planted area in the state of Mato Grosso do Sul underwent a reduction of around 43.3% compared to the previous crop. Concerning productivity, there will be a significant loss because of frost that has occurred in July 24-25, 2013 when the largest portion of this crop was in graining stage (85%), therefore, very vulnerable to frost. Estimates of losses are not fully measured since the event has taken place not too long ago; nevertheless, it is estimated that initial losses are at least 35% in relation to previous assessment, with productivity now achieving 1,313 kg/ha. This adverse weather occurred in all producing states that, along with decrease in planted areas, will certainly set higher pressure in prices paid to farmers, as well as increase in imports in order to fulfill domestic demand of this commodity.

Farmers are betting in the state of Minas Gerais in area increase of 38.1%. In this state, farming of this grain appears as a good alternative for land use in the winter period because of low temperatures coinciding with the vegetative development, often restrictive to farming of other produces, especially in the southern portion of the state. The delay in harvesting the summer crop also delayed wheat planting in some municipalities, and rainfall shortage in mid-April already brings concern regarding crops development. The average productivity is estimated in 3,310 kg/ha and yield of 98.3 thousand tons. Crops are in vegetative development (13.0%), blossoming (12.5%), fructification (34.2%), and maturation (38.5%) stages. The remnant of crops (1.8%) has started harvesting already.

The national wheat yield for the 2013-2014 season shall reach 5,619.0 thousand tons, representing an increase of 28.3% when compared to past crop.

Table 26
WHEAT 2013
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2012/2013 AND 2013/2014 CROPS

REGION/STATE	AREA (In thousand ha)			PRODUCTIVITY (In kg/ha)			PRODUCTION (In thousand t)		
	12/13 Crop	13/14 Crop	VAR. %	12/13 Crop	13/14 Crop	VAR. %	12/13 Crop	13/14 Crop	VAR. %
	(a)	(b)	(b/a)	(c)	(d)	(d/c)	(e)	(f)	(f/e)
MID-WEST	24,8	20,6	(16,9)	2.750	3.772	37,2	68,2	77,7	13,9
MS	15,0	8,5	(43,3)	1.600	1.313	(17,9)	24,0	11,2	(53,3)
GO	9,0	11,4	27,0	4.400	5.400	22,7	39,6	61,6	55,6
DF	0,8	0,7	(12,5)	5.700	7.000	22,8	4,6	4,9	6,5
SOUTHEAST	53,5	81,6	52,5	3.036	2.920	(3,8)	162,4	238,3	46,7
MG	21,5	29,7	38,1	3.753	3.310	(11,8)	80,7	98,3	21,8
SP	32,0	51,9	62,1	2.553	2.698	5,7	81,7	140,0	71,4
SOUTH	1.817,1	2.020,3	11,2	2.283	2.625	15,0	4.148,9	5.303,0	27,8
PR	773,8	940,9	21,6	2.730	2.840	4,0	2.112,5	2.672,2	26,5
SC	67,1	69,0	2,9	2.110	2.543	20,5	141,6	175,5	23,9
RS	976,2	1.010,4	3,5	1.941	2.430	25,2	1.894,8	2.455,3	29,6
CENTER-SOUTH	1.895,4	2.122,5	12,0	2.311	2.647	14,5	4.379,5	5.619,0	28,3
BRAZIL	1.895,4	2.122,5	12,0	2.311	2.647	14,5	4.379,5	5.619,0	28,3

SOURCE: CONAB - Suvey: Aug/2013

TRITICALE

Table 27
TRITICALE 2013
COMPARISON OF AREA, AVERAGE AND PRODUCTION
2012/2013 AND 2013/2014 CROPS

REGION/STATE	AREA (In thousand ha)			PRODUCTIVITY (In kg/ha)			PRODUCTION (In thousand t)		
	12/13 Crop	13/14 Crop	VAR. %	12/13 Crop	13/14 Crop	VAR. %	12/13 Crop	13/14 Crop	VAR. %
	(a)	(b)	(b/a)	(c)	(d)	(d/c)	(e)	(f)	(f/e)
SOUTHEAST	20,0	18,6	(7,0)	2.565	2.435	(5,1)	51,3	45,3	(11,7)
SP	20,0	18,6	(7,1)	2.563	2.438	(4,9)	51,3	45,3	(11,7)
SOUTH	28,0	22,5	(19,6)	2.343	2.662	13,6	65,6	59,9	(8,7)
PR	22,4	16,3	(27,2)	2.391	2.863	19,7	53,6	46,7	(12,9)
SC	0,4	0,7	75,0	2.181	2.570	17,8	0,9	1,8	100,0
RS	5,2	5,5	6,3	2.140	2.080	(2,8)	11,1	11,4	2,7
CENTER-SOUTH	48,0	41,1	(14,4)	2.435	2.560	5,1	116,9	105,2	(10,0)
BRAZIL	48,0	41,1	(14,4)	2.435	2.560	5,1	116,9	105,2	(10,0)

SOURCE: CONAB - Suvey: Aug/2013

5. BALANCE OF SUPPLY AND DEMAND

Table 28

BRAZIL

GRAINS - SUPPLY AND DEMAND FIGURES

(In thousand t)

PRODUCTS	SEASON	INITIAL STOCK	PRODUCTION	IMPORTS	SUPPLY	CONSUMPTION	EXPORTS	END STOCK
COTTON FIBRE	2008/09	675,0	1.213,7	14,5	1.903,2	1.004,1	504,9	394,2
	2009/10	394,2	1.194,1	39,2	1.627,5	1.039,0	512,5	76,0
	2010/11	76,0	1.959,8	144,2	2.180,0	900,0	758,3	521,7
	2011/12	521,7	1.893,3	3,5	2.418,5	865,0	1.052,8	500,7
	2012/13	500,7	1.275,1	35,0	1.810,8	887,0	530,0	393,8
RICE	2008/09	2.033,7	12.602,5	908,0	15.544,2	12.118,3	894,4	2.531,5
	2009/10	2.531,5	11.660,9	1.044,8	15.237,2	12.152,5	627,4	2.457,3
	2010/11	2.457,3	13.613,1	825,4	16.895,8	12.236,7	2.089,6	2.569,5
	2011/12	2.569,5	11.599,5	1.068,0	15.237,0	12.100,0	1.455,2	1.681,8
	2012/13	1.681,8	11.858,3	1.000,0	14.540,1	12.100,0	1.100,0	1.340,1
EDIBLE BEAN	2008/09	230,0	3.502,7	110,0	3.842,7	3.500,0	25,0	317,7
	2009/10	317,7	3.322,5	181,2	3.821,4	3.450,0	4,5	366,9
	2010/11	366,9	3.732,8	207,1	4.306,8	3.600,0	20,4	686,4
	2011/12	686,4	2.918,4	312,3	3.917,1	3.500,0	43,3	373,8
	2012/13	373,8	2.828,2	400,0	3.602,0	3.400,0	50,0	152,0
CORN	2008/09	7.675,5	51.003,8	1.181,6	59.860,9	45.414,1	7.333,9	7.112,9
	2009/10	7.112,9	56.018,1	391,9	63.522,9	46.967,6	10.966,1	5.589,2
	2010/11	5.589,2	57.406,9	764,4	63.760,5	48.485,5	9.311,9	5.963,1
	2011/12	5.963,1	72.979,5	774,0	79.716,6	51.533,4	22.313,7	5.869,5
	2012/13	5.869,5	80.253,4	300,0	86.422,9	52.053,9	15.000,0	19.369,0
SOYBEAN	2008/09	4.540,1	57.161,6	99,4	61.801,1	32.564,0	28.562,7	674,4
	2009/10	674,4	68.688,2	117,8	69.480,4	37.800,0	29.073,2	2.607,2
	2010/11	2.607,2	75.324,3	41,0	77.972,5	41.970,0	32.986,0	3.016,5
	2011/12	3.016,5	66.383,0	266,5	69.666,0	36.754,0	32.468,0	444,0
	2012/13	444,0	81.456,7	150,0	82.050,7	42.401,4	37.810,0	1.839,3
SOYBEAN MEAL	2008/09	3.053,0	23.187,8	43,4	26.284,2	12.000,0	12.253,0	2.031,2
	2009/10	2.031,2	26.719,0	39,5	28.789,7	12.300,0	13.668,6	2.821,1
	2010/11	2.821,1	29.298,5	24,8	32.144,4	13.400,0	14.355,0	4.389,4
	2011/12	4.389,4	26.026,0	5,0	30.420,4	13.950,0	14.289,0	2.181,4
	2012/13	2.181,4	29.739,5	6,0	31.926,9	14.325,0	14.925,0	2.676,9
SOYBEAN OIL	2008/09	246,2	5.872,2	27,4	6.145,8	4.250,0	1.593,6	302,2
	2009/10	302,2	6.766,5	16,2	7.084,9	4.980,0	1.563,8	541,1
	2010/11	541,1	7.419,8	0,1	7.961,0	5.400,0	1.741,0	820,0
	2011/12	820,0	6.591,0	1,0	7.412,0	5.495,0	1.757,1	159,9
	2012/13	159,9	7.531,4	3,0	7.694,3	5.640,0	1.750,0	304,3
WHEAT	2008/09	895,7	5.884,0	5.676,4	12.456,1	9.398,0	351,4	2.706,7
	2009/10	2.706,7	5.026,2	5.922,2	13.655,1	9.614,2	1.170,4	2.870,5
	2010/11	2.870,5	5.881,6	5.771,9	14.524,0	10.242,0	2.515,9	1.766,1
	2011/12	1.766,1	5.788,6	6.011,8	13.566,5	10.444,9	1.901,0	1.220,6
	2012/13	1.220,6	4.379,5	7.000,0	12.600,1	10.584,3	1.683,4	332,4
	2013/14	332,4	5.619,0	6.800,0	12.751,4	10.763,4	1.200,0	788,0

SOURCE: CONAB - Suvey: Aug/2013

ENDING STOCKS:

- COTTON FIBER, BEANS, CORN AND SOYBEANS: December, 31

- RICE: February, 28

- WHEAT: July, 31

<p>SUREG AC Travessa do Icó, Nº 180 Estação Experimental 69.901.180 Rio Branco, AC fone 68 3221 8921 ac.sureg@conab.gov.br</p>	<p>SUREG MA Av. Jerônimo de Albuquerque, 06 Ed. Nena Cardoso - Vinhais 65071 750 São Luís MA fone 98 2109 1300 ma.sureg@conab.gov.br</p>	<p>SUREG RJ R. da Alfândega, 91, 11º, 12º e 14º andares 20010 001 Rio de Janeiro RJ fone 21 3861 5750 rj.sureg@conab.gov.br</p>
<p>SUREG AL Rua Tobias Barreto, s/n - Bebedouro 57017 690 Maceió AL fone 82 3241 0838 al.sureg@conab.gov.br</p>	<p>SUREG MS Av. Mato Grosso, 1022 - Centro 79002 232 Campo Grande MS fone 67 3383 1666 ms.sureg@conab.gov.br</p>	<p>SUREG RN Av. Jerônimo Câmara, 1814 Lagoa Nova 59060 300 Natal RN fone 84 4006 7616 rn.sureg@conab.gov.br</p>
<p>SUREG AM Av. Min. Mário Andreazza, 2196 Distrito Industrial 69075 830 Manaus AM fone 92 3182 2402 am.sureg@conab.gov.br</p>	<p>SUREG MT R. Padre Jerônimo Botelho, 510 Ed. Everest - Dom Aquino 78015 240 Cuiabá MT fone 65 3616 3803 mt.sureg@conab.gov.br</p>	<p>SUREG RO Av. Farquar, 3305 - Bairro Pedrinhas 78904 660 Porto Velho RO fone 69 3216 8418 ro.sureg@conab.gov.br</p>
<p>SUREG AP Av. Ernesto Borges, 740 (Prédio do Sebrae), Laguinho 68.908-180 Macapá, AP fone 96 2101 3223 ap.sureg@conab.gov.br</p>	<p>SUREG MG R. Professor Antônio Aleixo, 756 Bairro Lourdes 30180 150 Belo Horizonte MG fone 31 3290 2800 mg.sureg@conab.gov.br</p>	<p>SUREG RR Av. Venezuela, 1120 - Portão A Bairro Mecejana 69309 695 Boa Vista RR fone 95 3623 9460 rr.sureg@conab.gov.br</p>
<p>SUREG BA/SE Av. Antônio Carlos Magalhães, 3840 40 andar, Ed. Capemi, Bl. A - Pituba 40821 900 Salvador BA fone 71 3113 8630 ba.sureg@conab.gov.br</p>	<p>SUREG PA R. Joaquim Nabuco, 23, Bairro Nazaré 66055 300 Belém PA fone 91 3218 3602 pa.sureg@conab.gov.br</p>	<p>SUREG RS R. Quintino Bocaiúva, 57 - Floresta 90440 051 Porto Alegre RS fone 51 3326 6400 rs.sureg@conab.gov.br</p>
<p>SUREG CE R. Antônio Pompeu, 555 José Bonifácio 60040 001 Fortaleza CE fone 85 3252 1722 ce.sureg@conab.gov.br</p>	<p>SUREG PB R. Coronel Estevão D'Ávila Lins, s/n Cruz das Armas 58085 010 João Pessoa PB fone 83 3242 6573 pb.sureg@conab.gov.br</p>	<p>SUREG SC BR 101, Km 205 - Barreiros 88110 200 São José SC fone 48 3381 7210 sc.sureg@conab.gov.br</p>
<p>SUREG ES Av. Princesa Isabel, 629 Sala 702 Ed. Vitória Center - Centro 29010 904 Vitória ES fone 27 3041 4005 es.sureg@conab.gov.br</p>	<p>SUREG PE Estrada do Barbalho, 960 - Iputinga 50690 000 Recife PE fone 81 3453 4038 pe.sureg@conab.gov.br</p>	<p>SUREG SP Alameda Campinas, 433 Térreo, 2º, 3º, 4º e 5º andares Jardim Paulista 01404-901 São Paulo, SP fone 11 3264 4800 sp.sureg@conab.gov.br</p>
<p>SUREG GO Av. Meia Ponte, 2748 - Sta. Genoveva 74670 400 Goiânia GO fone 62 3232-4402 go.sureg@conab.gov.br</p>	<p>SUREG PI R. Honório de Paiva, 475 Sul - Piçarra 64001 510 Teresina PI fone 86 3194 5400 pi.sureg@conab.gov.br</p>	<p>SUREG TO Quadra 103 Norte Rua 01 Lote 33/35 Plano Diretor Norte 77015 034 Palmas TO fone 63 3218 7402 to.sureg@conab.gov.br</p>
	<p>SUREG PR R. Mauá, 1116 - Alto da Glória 80030 200 Curitiba PR fone 41 3313 2700 pr.sureg@conab.gov.br</p>	

Informações

Conab - Companhia Nacional de Abastecimento

www.conab.gov.br
gevep@conab.gov.br
Telefone: 61 3312-6277
SGAS Quadra 901 Conjunto A Lote 69 - 70.390-010



**Ministério da
Agricultura, Pecuária
e Abastecimento**

